



# Helping Teacher-Created Ideas Survive and Thrive

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# **Helping Teacher-Created Ideas Survive and Thrive**

Doctor of Education Leadership (Ed.L.D.)  
Capstone

Submitted by  
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To the Harvard Graduate School of Education  
in partial fulfillment of the requirements for the degree of  
Doctor of Education Leadership

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## Abstract

*How might we encourage educators' ideas and innovative approaches, and support the survival, sustenance, and growth of those ideas and innovations?*

This essential question is relevant and important for the U.S. education sector given continued calls for innovative instructional improvements coexisting with the difficulty of stewarding change in school contexts. A strategic project situated in IDEO (a design and innovation firm), The Teachers Guild (one of its entrepreneurial ventures), and the Design for Learning studio (one of its organizational groups) investigated this essential question.

This capstone illustrates that while innovation may be sparked productively through enterprising, influential, early visionaries, leaders and organizations aspiring to broad, positive social impact in the education sector must: (1) attend explicitly and regularly to socioeconomic inclusion and racial diversity; and (2) engage public education agencies as they enroll the preponderance of our nation's children. This may require adaptive work from educators and their organizations to achieve. Regular, intentional practice can scaffold this adaptive work. Internally, shared stories and aspirations can establish guiding purpose. Externally, stakeholder visibility and financial resources can set and sustain the momentum of this adaptive work. Rather than employing externally-facing accountability and financial incentives through top-down directives (as in *Race to the Top* or *No Child Left Behind*), jointly crafted stories and aspirations should instead provide the motivating intention.

This capstone further illustrates that the stimulation, survival, sustenance, and growth of education innovations may be enhanced by: (1) enhancing educators' sense of self-efficacy; (2) bolstering educators' capacity for story-driven leadership; (3) focusing policy attention toward relationships and connection rather than toward systems and content; and (4) utilizing concrete techniques that facilitate innovation-oriented change, such as linking educators across usual educator roles and across typical system boundaries.

The Design for Learning studio's and The Teachers Guild's experience reinforced that stories and data-driven evidence are not dichotomous, but complementary—stories provide an engaging entry point to later evidential data. Further, designing innovation programs for individual educators may yield meaningful *personal* impact but likely attenuated *sector-level* impact. In contrast, designing collaboration across roles and schools reduced barriers to and accelerated teacher-driven innovation.

## Introduction

“Our vision of instructional improvement depends heavily on people being willing to take the initiative, to take risks, and to take responsibility for themselves, for students, and for each other. You only get this kind of result when people cultivate a deep personal and professional respect and caring for each other... The worst part of bureaucracy is the dehumanization it brings. We try to communicate that professionalism, and working in a school system, is not a narrowed version of life; it is life itself, and it should take into account the full range of personal values and feelings that people have.” (Elmore & Burney, 1997, pp. 10-11)

Anthony Alvarado shared the above vision twenty years ago, reflecting on his experience as an instructional superintendent in New York City’s public schools. Though Alvarado’s reflections and aspirations were from 1997, they remain just as contemporary and relevant in 2017.

A central focus for education leaders is the ongoing improvement and enhancement of the “instructional core” (City, Elmore, Fiarman, & Teitel, 2009, p. 88; Childress, Elmore, Grossman, & King, 2011, p. 2) —that is, “the interactions among teachers and students around educational material” (Cohen & Ball, 1999, p. 2). One of many complementary ways to improve the instructional core is to foster education innovation—that is, novel, promising approaches to learning and teaching (*San Antonio Independent School District v. Rodriguez*, 1973, 411 U.S. 50). However, larger scale education innovations historically have been crafted and promoted outside of the classroom—that is, with teachers as *recipients* rather than *authors* of prospective innovations (Cuban, 1993, p. 245). **This capstone therefore explores a core, essential question in an experiential leadership context: *How might we encourage educators’ ideas and innovative***

*approaches, and support the survival, sustenance, and growth of those ideas and innovations?*

The capstone investigates this essential question through a strategic project situated at IDEO—“a global design and innovation firm” (2017, para. 1)—and executed through The Teachers Guild (one of IDEO’s entrepreneurial ventures) and the Design for Learning studio (one of IDEO’s organizational groups).

This capstone’s essential question is relevant and important for the United States education sector because of the continued call for more contemporary, relevant, and representative school models coexisting with the difficulty of stewarding change in school contexts. This essential question is explored through a strategic project situated in IDEO, an organization that self-identifies and is externally acclaimed for its innovation know-how (IDEO, 2016a; Amabile, Fisher, & Pillemer, 2014; Ingram & Covell, 2016), and seeks to apply productively its innovation capabilities to the education sector (IDEO, 2012).

This capstone will illustrate that education leaders and organizations seeking to encourage broad, positive social impact in the education sector must—by definition of their impact aspirations—attend explicitly and regularly to socioeconomic inclusion and racial diversity. Prior to this strategic project, IDEO’s experience in the education sector indicated that innovation may be sparked productively by engaging enterprising, well-connected, influential, early visionaries (Rogers, 2003; Granovetter, 1978). As IDEO (2016c) aspires to maximize its “positive impact through design” (para. 2), the outcomes of this strategic project suggest that it may sustain and expand its momentum with

early visionaries by working increasingly with those education organizations that serve the preponderance of our nation’s children: public education agencies, representing a socioeconomically and racially diverse population of young people. IDEO’s historically strong engagement of foundations and nonprofits may prove useful in this regard.<sup>1</sup> Such explicit and regular attention to socioeconomic inclusion and racial diversity requires adaptive work from educators and their organizations (Singleton, 2015; Heifetz, 1994). Purposeful practice—“acting into a new way of thinking”—can facilitate this adaptive journey (Pascale, Sternin, & Sternin, 2010). Internally, shared, jointly crafted stories and aspirations can establish purpose and motivate this adaptive journey (Ganz, 2011). Externally, stakeholder visibility and financial resources (Childress et al., 2011) can serve as nudges that sustain the momentum of this adaptive journey.

This capstone will demonstrate that the survival, sustenance, and growth of education innovations may be enhanced by bolstering educators’ capacity for story-driven leadership. While the education sector has built educators’ capacity for evidential assessment—particularly over the past fifteen years in the wake of No Child Left Behind—shared story-crafting and story-telling have been less explored. These skills are not competitive, but rather are complementary: shared stories may be employed as an early point of entry toward later, subsequent, more rigorous evidence (Lawrence-Lightfoot & Davis, 1997).

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<sup>1</sup> The range and distribution of IDEO’s education clients are discussed further in the *Organizational Context, Evidence to Date, Analysis of the Strategic Project, and Implications for Site* sections later in this capstone.



This capstone will show that educator-driven innovations may be stimulated by linking educators across typical system boundaries and across usual educator roles. This is one illustrative example of a broader variety of change management techniques that leaders may design into education innovations (Kotter, 1995; Kanter, 1983; Fisher et al., 1991).

Finally, this capstone will discuss the potential value of focusing policy designs toward relationships and connection rather than our current emphases of systems and content. This capstone's strategic project demonstrated that teachers are particularly hungry for supportive, engaging, trusting, relationships with fellow colleagues. Such relationships are prerequisites for the kind of "deep personal and professional respect and caring" that Alvarado envisioned, which enables the willingness "to take the initiative [and] to take risks" that innovation requires (Bryk & Schneider, 2002).

## **Organizational Context**

As context for the capstone and its strategic project, it is helpful to introduce IDEO, the Design for Learning studio ("D4L"), and The Teachers Guild ("the Guild"), the organizations in which the strategic project is situated.

IDEO is a design firm that specializes in consulting to help solve innovation challenges (A. Diefenthaler, personal communication, March 2, 2017). Its focus is topical (i.e., design), and its consulting breadth therefore spans across a variety of clients and industries (e.g., consumer products, financial services, education). IDEO organizes itself across four dimensions:

- “Locations” (geographic places such as San Francisco and Tokyo);
- “Studios” (by industry, such as the “Food Studio,” or by topical initiative, such as “Design for Change”);
- “Creative products and services,” such as CoLab and IDEO U; and
- Internal functions (such as legal, office “experience,” and marketing and communications).

As of September 2016, IDEO employed roughly 650 individuals across nine locations and several “creative products and services” (D. Strong, personal communication, October 16, 2016). As a privately held, for-profit company, IDEO’s revenue and profitability metrics are not publicly disclosed.

Design for Learning is an IDEO studio; “a center of excellence focused on work for the education sector” (A. Diefenthaler, personal communication, March 2, 2017). Launched in 2013 and led by partner Sandy Speicher, D4L builds on the momentum and interest stimulated by IDEO’s 2011 publication and 2012 second edition of its *Design Thinking for Educators* toolkit.<sup>2</sup> Since *Design Thinking for Educators*, D4L has worked with a variety of clients across the education sector—private and public school organizations (e.g., private schools, government agencies, public school districts); foundations and nonprofits; domestic, international, and global. D4L has also engaged clients across a variety of levels in the education sector, from early childhood to higher education.

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<sup>2</sup> The *Design Thinking for Educators* toolkit is discussed further in the *Review of Knowledge for Action (RKA)* section later in this capstone.

*Design Thinking for Educators* spurred external interest not only for consulting projects with IDEO, but also for additional coaching and resources to scaffold educators' creativity and innovation. Further, while the Design for Learning studio is organized primarily around consulting projects, it also mirrors IDEO's broader exploration of "creative products and services." As with IDEO, "creative products and services" appear attractive to D4L as opportunities to extend the life of its work beyond the discrete timelines of consulting projects.

With this spirit, D4L launched The Teachers Guild in 2015 as a creative collaborative for teachers. The Guild aspires to be a teacher-led, member-led community where teachers create innovative education approaches based on their experience and connection to their students' unique needs. As opposed to teachers being primarily *recipients* of education policy changes crafted by other actors, The Teachers Guild repositions and supports teachers as *authors* of relevant solutions for our students and our schools (IDEO & The Teachers Guild, 2016, p. 3).

The Design for Learning studio—and IDEO in turn—considers The Teachers Guild as one of several "creative products and services" that it fosters and incubates. The Guild operates as a standalone non-profit organization, legally separate from the for-profit operations of IDEO and D4L but practically and philosophically in close collaboration with their teams and work.

This capstone's strategic project was situated in The Teachers Guild and the Design for Learning studio. The strategic project's focus was to plan for The Teachers Guild's growth and extend the resulting lessons to D4L. The intent of the strategic project was to enhance and maximize the Guild's and D4L's—

and by extension, IDEO's—positive social impact in the education sector.

The strategic project will be discussed further in the *Description of the Strategic Project* section later in this capstone.

Subsequent discussion of the strategic project will reference the Guild and D4L as appropriate. Additionally, subsequent references to IDEO may refer, as appropriate, to:

- The Guild and D4L collectively; or
- The entirety of the IDEO organization, including all of its locations, studios, “creative products and services,” and internal functions.

## **Review of Knowledge for Action (RKA)**

The research literature provides additional context for this capstone and its strategic project.

## **Innovation in Educational Discourse**

Kanter (1983) defines innovation as “the process of bringing any new, problem-solving idea into use... Innovation is the generation, acceptance, and implementation of new ideas, processes, products, or services” (p. 20).

Nearly twenty years into the twenty-first century, a broad variety of scholars and practitioners continue to call for innovation in models and approaches for elementary and secondary schools. Areas of focus for such school innovation range widely in direction and philosophy—as just a few illustrative examples:

- Problem-based learning to better align with a knowledge economy (Fine & Mehta, 2014; Wagner, 2008) (i.e., a “deeper learning” approach);
- Workplace-embedded, career-focused experiences that make explicit and model for young people the practices associated with economic success (Pathways to Prosperity Network, 2014) (i.e., an “economic access” approach);
- More representative and empowering school experiences for youth of color (Duncan-Andrade & Morrell, 2008) (i.e., a “critical pedagogy” approach); and
- Wraparound schools that more tightly integrate classroom instruction with social services and local stakeholders (Oakland Unified School District, 2011; Harlem Children’s Zone, 2009) (i.e., a “community schools” approach).

These examples are clearly not exhaustive, but illustrate how the promise of innovation in education is not only compatible with but also desired by a wide variety and diversity of pedagogical and political perspectives.

Further, practitioners and scholars comment on the increasing irrelevance of “factory model” schools—designed in an industrial economy—to the realities of the twenty-first century (Childress, Samouha, Tavenner, & Wetzler, 2015, p. 7).

In the absence of scale-ready alternatives, innovation appears attractive as a path for reimagining elementary and secondary schools.

This narrative is reflected empirically in the growing number of organizations focused on fostering innovation in the education sector. As a few illustrative examples:

- Transcend (2016) intends to provide research-and-development capacity for “breakthrough innovation” (para. 1) of “fundamentally new learning environments” (para. 6);
- 4.0 Schools (2016) offers programs for “people dedicated to building the future of school” (para. 2); and
- LearnLaunch (2016) offers a start-up accelerator, co-working space, and a practitioner institute “to drive innovation and transform learning” with a particular focus on the Boston area (para. 2).

Despite the growing number of organizations and practitioner attention in this space, the literature about innovation in education is relatively thin. This contrasts with other disciplines—for example, business—where the body of innovation literature is significantly more robust. Library catalog results may be used as a very coarse proxy for literature coverage: while roughly 1.1 million result hits are observed for the search terms “innovation in business;” only about 460,000 result hits<sup>3</sup> are observed for the search terms “innovation in education;” and only about 38,000 result hits are observed collectively for the search terms “innovation in K-12 education,” “innovation in elementary education,” and “innovation in secondary education.” These are order-of-magnitude differences in literature coverage between the education sector and the business sector, lending further significance to this capstone’s essential question.

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<sup>3</sup> Harvard University’s HOLLIS+ library catalog system was used to search journal articles. Illustrative search results were gathered on April 19, 2016.

Why might innovation be so much less represented in our educational discourse than in that for business? The culture and the structure of public school teaching offer particular clues. First, the current culture of public school teaching tends toward solitary practice, while collaboration is recognized as a crucial ingredient for innovation—and improvement more generally—in education (Bryk, Gomez, Grunow, & LeMahieu, 2015). Cuban (2013) observes that while teachers may exchange “occasional advice and sharing of anecdotes” about their professional practice, “the act of teaching within a self-contained classroom” results in teachers being “isolated from colleagues” and “fosters conservatism” (p. 254). Hess (2015b) notes that “the accumulated rules, routines, habits, and norms” of school practices and relationships are tantamount to “abject professional isolation [for teachers] for seven hours a day” (p. 38). This manifests in “U.S. teachers spend[ing] less than five percent of their time working in collaboration with their peers” (United States Department of Education, 2015, para. 6). While some schools are moving away from the traditional classroom model, our current, default expectations for teachers establish a cultural headwind for innovation in education.

This cultural inclination to isolation runs counter to the conditions identified by research to foster the spread and adoption of innovations. In particular, Rogers (2003) observes that innovations require advocates with robust social connections in order to spread beyond a niche audience to be adopted by a larger population. Given a population to which an innovation could apply, Rogers identifies a small set of visionaries (*innovators*) who attract the interest and action of forward-thinking vanguards (*early adopters*)

(pp. 282-285). If these leaders together produce sufficient awareness and inducement for the broader population to try an innovation and eventually integrate it into their repertoire, then it becomes more likely that a given population will broadly adopt the innovation (pp. 168-195). Clearly, to the extent that our extant educational culture biases toward solitary practice, this inhibits those conditions most conducive to innovation.

Second, with respect to structure, a variety of parameters circumscribe the range of public school teachers' practice. For example, accountability systems at the federal level (e.g., No Child Left Behind Act) and state level (e.g., from state education agencies as per the Every Student Succeeds Act) place external performance constraints on public school teachers' professional practice (United States Executive Office of the President, 2015). At the local level, collectively bargained labor contracts establish guidelines for public school teachers' work responsibilities, interaction with colleagues, and relationships with school principals.

## **A Framework for Instructional Improvement**

While innovation offers encouraging potential for the education sector, leaders must be attentive to the coherence of such innovations. Without coherent integration into local contexts, innovations may result in "Christmas tree schools"—shiny ornaments adorning an educational *status quo*—rather than deep, lasting, sustainable change (Bryk, Sebring, Kerbow, Rollow, & Easton, 1998, p. 123). The Coherence Framework of Harvard University's Public Education Leadership Project (the "PELP Coherence Framework") helps enhance



the alignment of education innovations as well as contextualize culture and structure in instructional improvement efforts.

Childress et al. (2011) describe the PELP Coherence Framework (depicted below in Figure 1) as “designed to help leaders identify the key elements that support a[n organization]-wide improvement strategy, bring those elements into a coherent relationship with the strategy and each other, and guide the actions of the people throughout the [organization] in the pursuit of high levels of achievement for all students” (p. 1).

Figure 1: PELP Coherence Framework (Childress et al., 2011)



The PELP Coherence Framework will be used later in this capstone to facilitate the discussion and analysis of the strategic project.

In Figure 1, the PELP Coherence Framework identifies “culture” and “structure” as two critical elements of instructional improvement that interplay with other factors for analyzing the coherence and areas of focus of particular educational approaches.

### Teacher Self-Efficacy and Agency

As these cultural and structural considerations compound in number, strength, and prescription, teachers’ professional practice may feel increasingly constrained both by rule and in spirit. This may attenuate public school teachers’ senses of self-efficacy and agency.

In this capstone’s context, self-efficacy and agency are considered synonymously to represent one’s perceived ability to take actions that achieve particular desired outcomes.<sup>4</sup> Bandura (1977) clarifies the distinction between outcomes *per se* and self-efficacy:

“Outcome and efficacy expectations are differentiated, because individuals can believe that a particular course of action will produce certain outcomes... [but] the strength of people’s convictions in their own effectiveness is likely to affect whether they will even try to cope with given situations.” (p. 193)

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<sup>4</sup> Finer distinctions may be explored between self-efficacy and agency. For example, self-efficacy may better describe *internal* self-perceptions of one’s capability, whereas agency may align more closely with *external* actors and structures that shape one’s capability (see also Bandura, 1982, p. 140). However, these distinctions are beyond the scope of this capstone.

Lasky (2005) observes that education initiatives have the potential to affect teachers' senses of agency positively (i.e., capability-expanding) and negatively (i.e., capability-reducing):

"[A]long with being the resources necessary to sustain teaching and learning activities, the stuff of [educational] reform also serves as a mediating system that affects teacher identity, while also creating the conditions for the ways teachers can teach in schools. Agency is thus affected by reform in part as it comes into interaction with teacher identity." (p. 916)

Bandura then makes plain the implications for teachers' professional practice:

"Judgments of self-efficacy also determine how much effort people will expend and how long they will persist in the face of obstacles or aversive experiences. When beset with difficulties people who entertain serious doubts about their capabilities slacken their efforts or give up altogether, whereas those who have a strong sense of efficacy exert greater effort to master the challenges." (1982, p. 123)

"Those who persist in subjectively threatening activities that are in fact relatively safe will gain corrective experiences that reinforce their sense of efficacy, thereby eventually eliminating their defensive behavior. Those who cease their coping efforts prematurely will retain their self-debilitating expectations and fears for a long time." (1977, p. 194)

At best, educators' robust feelings of agency can serve as a springboard for dealing with difficult or unexpected circumstances in novel ways. At worst, curtailed senses of self-efficacy can cultivate a mindset of victimization, where teachers may feel a sense of resignation in their current professional context because of such limited independent ability or control over this professional context.

While one may observe empirically this reduced sense of professional agency, one may also observe that public school teachers exercise a great deal of discretion over their classroom practice in spite of the constraints described above. As an example, even in the context of a historically well-regarded, highly coordinated, district-wide initiative to improve teaching practice, both practitioners and researchers acknowledge that “[t]eachers do not respond to simple exhortations to change their teaching” (Elmore & Burney, 1997, p. 8). This indicates that public school teachers can retain and exercise significant agency over their professional practice, even when the surrounding culture and professional structures expect otherwise.

Hess (2015a; 2013a) identifies teachers’ latent ability to shape their professional practice—despite the multitude of encroaching influences—as “cage-busting” teaching and school leadership. Hess observes:

“It is true, as would-be reformers often argue, that statutes, policies, rules, regulations, contracts, and case law make it tougher than it should be for school and system leaders to drive improvement and, well, lead. However, it is also the case that leaders have far more freedom to transform, reimagine, and invigorate teaching, learning, and schooling than is widely believed.” (2013b, para. 1)

“Teachers can have enormous effect on policy without hanging around statehouses...” (2015c, p. 62)

“Cage-busting is a complement to great classroom teaching, not a substitute for it. Teachers cage-bust so that they can spend less time in dull meetings and more time learning from colleagues. They cage-bust so that they spend fewer minutes watching students listen to announcements and more time infusing students with their passion.” (2015b, p. 39)

This does not negate the reality that external influence can constrain teachers' professional practice. At the same time, those aspiring to foster innovation in education need not fully resolve impinging cultural and structural considerations before innovation may take place; rather, a more immediate point of entry for innovation may be educators' senses of self-efficacy and agency.

Two seemingly disparate parallels—one from chemistry, and another from political organizing—can clarify an appeal to educators' self-efficacy and agency. First, the field of chemistry offers the concept of “activation energy.” Zumdahl and Zumdahl (2010) define activation energy as “the threshold energy... that must be overcome to produce a chemical reaction.” In some chemical reactions, “a certain minimum energy is required” for reactants to “‘get over the hill’ so that products can form” (p. 566). Lowering the activation energy for a particular reaction reduces the barrier to starting the reaction, increasing the likelihood of that reaction taking place. We might consider public school teachers' propensity to innovate as a sort of “reaction” with its own activation energy: the spark required to move a teacher from stasis to action. Those aspiring to foster innovation in education might therefore contemplate how to lower teachers' activation energy for novel explorations—by lowering teachers' activation energy for creative activities, education leaders may increase the likelihood of teacher-driven innovation.

As a second parallel, political organizer Marshall Ganz (2011) describes the importance of cultivating a sense of “you can make a difference” in organizing people toward action:

“One of the biggest inhibitors [to action] is *self-doubt*: I cannot do it. People like me cannot do it. We are not qualified, and so on. When we feel *isolated*, we fail to appreciate the interests we share with others, we are unable to access our common resources, we have no sense of a shared identity, and we feel powerless. We can counter self-doubt with *YCMAD: You Can Make a Difference*. The best way to inspire this belief is to frame what you do around *what people can do*, not what they cannot do.” (p. 279, emphasis in original)

Ganz encourages activists to develop people’s senses of self-efficacy as a means to catalyze action. While accountability pressures, performance constraints, and labor agreements may focus teachers’ attention on what they may *not* do, an entry point for innovation in education may be simply to reframe teachers’ perspectives on what they *can* do to build initial momentum.

## Design Thinking and IDEO

Encouragingly, design thinking is one example of a methodology that can reduce the activation energy to try something new and foster a sense of “you can make a difference.” While there are a variety of methodologies that may facilitate innovation, design thinking is a particularly relevant example as it is the primary approach used by IDEO, the residency site in which this capstone was situated.

IDEO (2016c) identifies itself as a “global design company” that “create[s] positive impact through design” (para. 2). Structurally, IDEO is a professional services organization specializing in “creative consulting” (Stinson, 2016, para. 5). Financially, while most of IDEO’s revenues are generated from fee-for-service consulting projects, it is growing an emergent portion of its business around longer-term “creative products and services” such as CoLab

(a research-and-development membership network) and IDEO U (online design courses) (S. Speicher, personal communication, October 31, 2016).

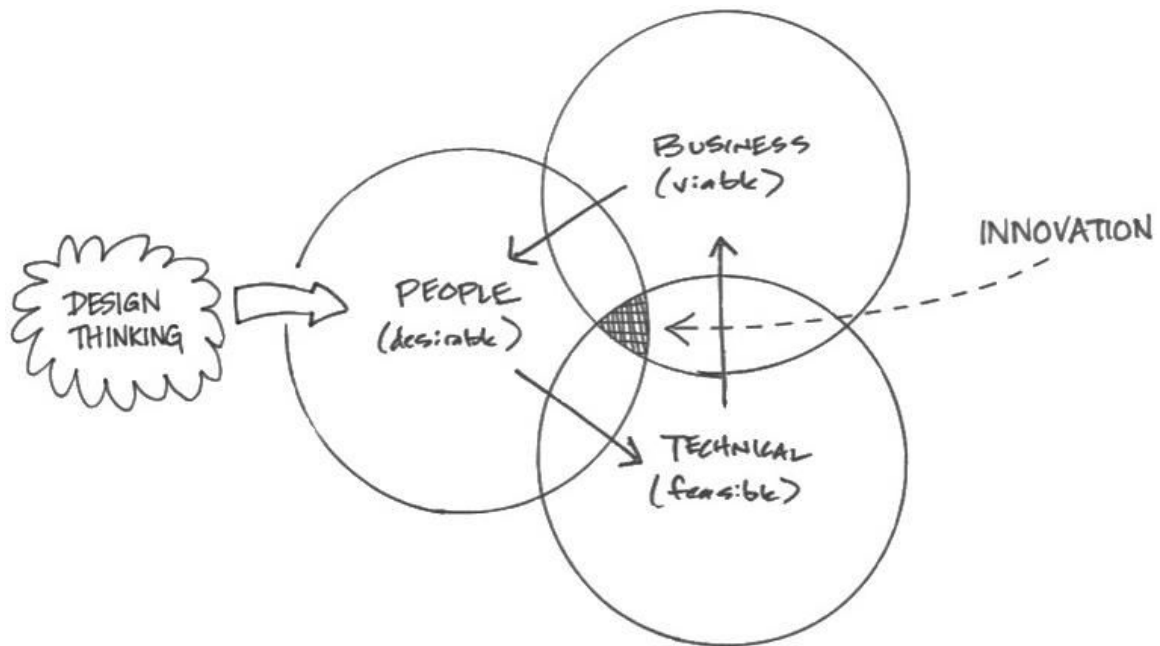
The term “design thinking” predates IDEO’s inception in 1991 — for example, Harvard Graduate School of Design professor Peter Rowe published the book *Design Thinking* in 1987. Rowe’s conception of design thinking is concerned with architecture in the literal sense (i.e., constructing buildings) rather than a more contemporary, metaphorical sense (e.g., of structuring concepts, teams, and organizations).

The term “design thinking” has since evolved to a more generalized concept (Kimbell, 2011) and has been central to IDEO’s organizational strategy since at least 2003 (Ingram & Covell, 2016). Kimbell (2011) observes “the main idea” of the contemporary, generalized notion of design thinking “is that the ways professional designers problem-solve is of value to firms trying to innovate and to societies trying to make change happen” (p. 285). The contemporary conception of design thinking retains Rowe’s structured, consultative elements, but with a more generalized eye beyond the specific discipline of architecture.

For their purposes, IDEO (2016a) defines design thinking as the synthesis of “what is desirable from a human point of view with what is technologically feasible and economically viable” (para. 6). In their view (summarized below in Figure 2), innovation resides at the nexus of:

- Desirability: “the needs of people;”
- Feasibility: “the possibilities of technology;” and
- Viability: “the requirements for business success.”

Figure 2: IDEO (2016a; n.d.) Approach to Design Thinking



IDEO's design thinking process works iteratively through three intermingled "spaces:"

- Inspiration: "the circumstances (be they a problem, an opportunity, or both) that motivate the search for solutions" (Brown, 2008);
- Ideation: "the process of generating, developing, and testing ideas that may lead to solutions" (Brown, 2008); and
- Implementation: "the path that leads from the project room to the market" (Brown, 2009).

IDEO has further applied its design thinking approach to the education sector. Its *Design Thinking for Educators* (2012) toolkit codifies this approach as it applies to schools, teaching, and learning. Interestingly, some of the prose in *Design Thinking for Educators* mirrors directly Ganz's political organizing



language, emboldening educators that “design thinking is about believing *we can make a difference*, and having an intentional process in order to get to new, relevant solutions that create positive impact” (p. 11, emphasis added). In doing so, IDEO encourages educators to “be confident in [their] creative abilities” and to “be optimistic” in their search for innovative ideas (p. 16). Such creativity and ideation aligns with Herzberg’s (2003) research about employee motivation; harnessing intrinsic motivators such as responsibility, recognition, and achievement; and reducing factors that contribute to dissatisfaction, such as stepping outside traditional strictures of one’s day-to-day role. By boosting educators’ senses of agency and self-efficacy and by offering processes and templates tailored for education, IDEO (2012) intends to increase the number, scope, variety, and novelty (pp. 6-7) of teacher- and student-driven ideas reflected in schools and instruction (pp. 10-11).

Educators have demonstrated interest in IDEO’s design thinking approach in ways that align with IDEO’s stated intent. *Design Thinking for Educators* has been downloaded over 100,000 times by individuals around the world (M. McMahon, personal communication, February 17, 2017; Fenenbock, 2016; Riverdale Country School, 2014). As teachers implement the approach articulated in *Design Thinking for Educators* and reflect on their experience, patterns of benefits emerge. Own (2015) identifies illustrative examples of these benefits from her facilitation of design thinking workshops with teacher-leaders. Own—along with fellow teacher-leaders—observes that design thinking can help “channel frustration [and] hopelessness into action,” “help students see relationships betw[een] school and life;” get “students excited about learning”

with a “[r]eal world learning emphasis in classrooms,” increase “student engagement,” and enhance “teacher voice” (para. 14). These benefits align with previously discussed instructional and psychosocial themes, offering some encouragement of design thinking’s potential positive impact for educators.

## Relationships and Change

Innovation pundits note that “[g]enerating rafts of good ideas is [IDEO’s core] business” (Tischler, 2001, para. 1). However, the business and social science literature cautions that compelling ideas alone may not necessarily be victorious. Kotter (1996) advises that more than seventy percent of major change initiatives fail, and therefore organizations must focus structured attention on nurturing the seedlings of new ideas until they establish roots in the organization and can stand independently. Relatedly, when facilitating change, Senge (2006) encourages a “systems thinking” approach, where the actors, structure, and context surrounding the locus of change are considered integrally with the change in order to avoid unintended consequences as a result of the change.

Kanter (1983) offers a definition of change as it relates to organizations:

“Change involves the crystallization of new action possibilities (new policies, new behaviors, new patterns, new methodologies, new products, or new market ideas) based on reconceptualized patterns in the organization. The architecture of change involves the design and construction of new patterns, or the reconceptualization of old ones, to make new, and hopefully more productive, actions possible. It is important to remember that organizations change by a variety of methods, not all of them viewed as desirable by the people involved.” (p. 279)

Kanter observes that “change masters” — “those people and organizations adept at the art of anticipating the need for, and of leading, productive change” (p. 13)—focus not only on an innovation itself, but more importantly the interpersonal, persuasive, and organizational aspects of the surrounding environment so that innovations may sustain and thrive there (pp. 35-36).

In explaining change, Elmore (2004) extends Kanter’s definition, situates it in the education context, and names the relational considerations that can inhibit the adoption of innovations—that is, culture:

“The development of systematic knowledge about, and related to, large-scale instructional improvement requires a change in the prevailing culture of administration and teaching in schools. Cultures do not change by mandate; they change by the specific displacement of existing norms, structures, and processes by others; the process of cultural change depends fundamentally on modeling the new values and behavior that you expect to displace the existing ones.” (p. 11)

Elmore’s observations of change and culture connect back to and bolster earlier discussion of culture in the context of the PELP Coherence Framework.

Relatedly, Bryk and Schneider (2002) observe “relational trust” as a facilitating cultural force toward large-scale instructional improvement (pp. 12-34, 91-121).

In shifting an organization’s behavior to adopt and absorb new ideas, Granovetter (1978) observes that social pressures can inhibit the spread and adoption of otherwise attractive innovations. In Granovetter’s view, a group’s social expectations set informal “thresholds” for individual choices: below a certain threshold, the expected social stigma associated with doing something differently outweighs the expected benefits from an innovation; above a certain

threshold, an innovation's expected benefits seem sufficiently attractive to break from historically normal behavior (pp. 1422-1423).

Kotter (2012) observes that these social pressures inhibiting innovation are not only informal, but also codified in organizational structure and hierarchy. To survive and remain relevant, organizations continually manage a balance between exploratory discovery (where new opportunities are identified and seized) and operational optimization (where known successes are codified "with efficiency, predictability, and effectiveness") (p. 48). This tension—which Kotter characterizes as "strategic agility" versus "hierarchy" (p. 46)—is reminiscent of the polarities of "exploration" and "exploitation" (March, 1991) where organizations must "explore new opportunities even as they work diligently to exploit existing capabilities" (O'Reilly & Tushman, 2004, p. 74).

In overcoming this social resistance to change, Kotter (1995) cautions against relying on individual efforts or heroism. Rather, he encourages innovators to assemble and nurture groups with political and experiential credibility in their organizations—and typically "outside of formal boundaries, expectations, and protocol" (p. 62)—to buffer the social resistance to change and potential aversion to loss (Heifetz & Linsky, 2002; Ganz, 2010) associated with advancing and adopting new innovations. Not only do organizations generally demonstrate resistance and "work avoidance" in response to changes (Heifetz, Grashow, & Linsky, 2009, p. 30), but public education organizations also tend particularly toward stasis. As Cohen (1988) observes:

“Decisions about the adoption or use of innovations are not much affected by [public education] organizations’ need to survive or prosper, for schools will go on and salaries will be paid even if promising innovations fail or go untried.” (p. 35)

Like certain humans’ immune systems that reject the transplant of healthy, vibrant tissue in replacement of damaged tissue, organizations may counterproductively attack or suppress innovations before their benefits are realized. Extending Cohen’s observations above to the transplant metaphor, extant culture and structure enable public education organizations to reject healthy, new infusions. Heifetz et al. (2009); Pascale, Milleman, and Gioja (2000); and Scott (2007) similarly observe this biological analog to organizations’ ability to absorb new ideas, noting that “new adaptations significantly displace, reregulate, and rearrange some old [organizational] DNA” (Heifetz et al., 2009, p. 16). IDEO’s design thinking work—as applied so far to the education sector—has not yet tackled systematically these considerations of change management. While IDEO is developing in-house expertise in change management through its Design for Change (“D4C”) studio, to date The Teachers Guild and D4L have not yet integrated regularly their practices with D4C’s insights. As a result, IDEO’s celebrated ideation capabilities may be at greater risk for “transplant rejection” in the education sector.

By attending to change as a more integral part of design thinking for educators, IDEO may increase its rates of success and sustenance for the innovations in education that it helps to nurture. Stated differently, it “may be a necessary condition... but it is probably not a sufficient condition” to focus solely

on content, ideas, and structures in the service of improving teaching and schools (Elmore, 1992, p. 47). To become a “change master” (in Kanter’s (1983) parlance), IDEO can design for the relational aspects of change more centrally in its innovations for education.

## Shared Stories

In the context of this capstone’s strategic project, shared stories provide an engaging point of entry toward subsequent, more rigorous evidence. As alluded earlier in this section, Ganz encourages public leaders to use stories to forge shared purpose and urgency to action, and his public narrative framework is particularly relevant to IDEO as the organization’s work is structured around and motivated by stories.

Ganz (2011) considers effective public leadership to be a holistic integration of “the hands” (i.e., “action”), “the head” (i.e., a purposeful “strategy” guiding that action), and “the heart:”

“Mobilizing others to achieve purpose under conditions of uncertainty—what leaders do—challenges the hands, the head, and the heart... The challenge of the heart is one of motivation, of urgent need to act, and of hope for success, and the courage to risk it.” (pp. 273-274)

Ganz observes the power of storytelling in its ability to capture, evoke, and stoke “the heart” of social movements. Evoking Bandura’s notion of self-efficacy, Ganz encourages social leaders to use shared stories as a way to strengthen others’ capacity “to exercise agency” (p. 274).

In Ganz's notion of "public narrative," social change-makers ground their leadership in a "story of self." Public leaders then connect their individual story to a shared "story of us" by fostering a sense of community through "values" and "experience" that intersect across one's personal story and the community story in which one's leadership is situated. Through this grounding purpose and sense of community, the public leader and her team develop a shared "story of now," which establish the "urgency" for action and vision of desired success (p. 283). In Ganz's view, stories are powerful, experiential devices to build relationships and community as well as bolster public leadership.

Below, Figure 3 summarizes Ganz's public narrative framework, explaining and depicting the relationships between the complementary stories of "self," "us," and "now." As West (2016) observes that "IDEO's currency is in stories" (para. 21), Ganz's public narrative framework will be used later in this capstone—alongside the PELP Coherence Framework—to organize the discussion and analysis of the strategic project.

Figure 3: Ganz (2011) Public Narrative Framework



## Demographics and Impact

Finally, it is important to consider the demographic context in which The Teachers Guild, the Design for Learning studio, and IDEO operate. Roughly 55 million children attend U.S. schools from prekindergarten through twelfth grade. Of these elementary- and secondary-level students, more than 90 percent attend public schools and fewer than 10 percent attend private schools. Relatedly, roughly 20 million young adults attend U.S. colleges and universities (National Center for Education Statistics, 2016a). Of these postsecondary-level



students, more than 80 percent attend public colleges and universities (O'Shaughnessy, 2011).

Of U.S. elementary and secondary students attending public schools, the majority attend traditional public schools, as public charter school enrollment comprises only about five percent of total public school enrollment (National Center for Education Statistics, 2016a; National Center for Education Statistics, 2016b). Traditional public PK-12 schools operate within the most regulated governance context, while public charter PK-12 schools operate with slightly less regulation and private PK-12 schools operate with the comparatively least regulation (Mehta & Teles, 2012).

When compared to the average racial and ethnic distribution of all children in the United States (Kaiser Family Foundation, 2015):<sup>5</sup>

- The average racial and ethnic distribution of all PK-12 public schools is roughly similar (National Center for Education Statistics, 2016c);
- Public PK-12 charter schools, on average, tend to enroll disproportionately more Black and Latino students (National Center for Education Statistics, 2016b); and
- Private PK-12 schools, on average, tend to enroll a student body with a more equal representation across races and ethnicities (National Center for Education Statistics, 2016d).

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<sup>5</sup> It is worth noting that the following demographic distributions are aggregate averages and exhibit significant local variation (Kaiser Family Foundation, 2015; National Center for Education Statistics, 2016b; National Center for Education Statistics, 2016c; National Center for Education Statistics, 2016d; National Center for Education Statistics, 2016e).

In U.S. PK-12 public schools, while White students are more than three times as likely to be in low-poverty schools than high-poverty schools, Latino and Black students are more than five times as likely and Native American students are more than four times as likely to be in high-poverty schools than low-poverty schools. Asian students tend to be in low-poverty schools, while Pacific Islander students tend to be in high-poverty schools (National Center for Education Statistics, 2016e).

Given the above data, demographics play a critical role in shaping this capstone's theories of action and educators' work more broadly. To the extent that education leaders direct their work to maximize positive social impact—and to the extent that equity, reach, and/or replicability factor centrally into leaders' conception of impact—demographic data alone suggest that education leaders must attend to representing in their programs the United States' rich diversity of young people. Where educational benefits accrue disproportionately to affluent and/or White students, equity pursuits are weakened. Where programs intended for scale instead serve niche audiences, reach is reduced. Where programs designed for broader applicability reach a disproportionate racial, ethnic, or socioeconomic subset of our young people, the case for replicability is diminished.

As will be discussed in subsequent sections, The Teachers Guild and the Design for Learning studio seek to maximize the positive social progress that their creative leadership and design expertise may encourage. The demographic data just discussed suggest that the Guild and D4L must design for

socioeconomic inclusion and racial diversity in their educational programs in order to realize fully their aspirations for impact.

## Theories of Action

To make explicit this capstone's praxis—what Freire (1970) calls “the action and reflection of men and women upon their world in order to transform it” (p. 79)—theories of action help structure the subsequent discussion and analysis. Organizational and individual theories of action may be articulated and compared.

Organizationally, IDEO does not operate with a formally defined and published theory of action. In her experience with IDEO as a funder and thought partner, Fahnestock (2014) celebrates that rather than prescriptively “starting with a... logic model, or theory of change,” IDEO instead “enters a project with the ending largely unknown” (para. 8). One may describe this simply as an artifact of practice—however, the matter is deeper and more philosophical. IDEO's CEO Tim Brown (2009) articulates:

“It is our ability to construct complex concepts that are both functionally relevant and emotionally resonant... [that is] the single most powerful tool of design thinking.” (p. 84)

“The reason for the iterative, nonlinear nature of the journey is not that design thinkers are disorganized or undisciplined but that design thinking is fundamentally an exploratory process...” (p. 16)

“[T]here is [yet] no algorithm that will tell us how to bring divergent possibilities into a convergent reality or analytical detail into a synthetic whole...” (p. 84)

This does not mean that IDEO operates solely through tribal knowledge; what Argyris and Schön (1978) might call a “theory-in-use” (p. 15). Rather, IDEO’s perspective does not align structurally with the sequential, causal forms of Argyris’s and Schön’s (1974) theories of action (pp. 3-6).

A working organizational theory of action (IDEO, 2017) may be inferred from David Kelley (IDEO’s founder) and Tom Kelley (an IDEO partner), synthesizing components from their book *Creative Confidence* (2013) into the form suggested by Argyris and Schön:

- **IF** IDEO “creat[es] new solutions” that “find” and honor “human needs” at their center...
  - **BY** “rel[ying] on the natural—and coachable—human ability to be intuitive [and] recognize patterns...”
  - **AND BY** “construct[ing] ideas that are emotionally meaningful as well as functional...”
  - **AND BY** “help[ing] clients envision what their new or existing operations might look like in the future—and build[ing] road maps for getting there...”
  - **AND BY** “using the tools and mindsets of design practitioners...”
  - **THEN** IDEO will “foster creative cultures,” “embed innovation into the fabric” of organizations, and “build the internal systems required to sustain innovation,” thereby “help[ing] organizations in the public and private sectors innovate and grow” and “launch new ventures.”
- (pp. 24-26)

For clarity, it is worth reiterating that the strategic project was located specifically within The Teachers Guild and D4L, and that the Guild and D4L are situated within IDEO as a “creative product and service” (CPS) and a studio, respectively. As IDEO does not operate with a formal, organization-wide theory of action, the Guild and D4L similarly do not operate with formal CPS-specific and studio-specific theories of action. As a practical matter, however, both the Guild and D4L operate in line with IDEO’s theory of action, and the inferred, organizational theory of action articulated above can be considered to apply to the Guild and D4L as well (S. Speicher, personal communication, January 17, 2017; M. McMahon, personal communication, February 17, 2017; A. Diefenthaler, personal communication, March 2, 2017).

Individually, I approached this capstone and its strategic project with personal purpose to enhance others’ ability to live self-directed, choice-filled lives, with an eye to advancing equity, and informed by the research literature just discussed. I therefore consider the following personal theory of action as an education leader in the scope of this capstone and strategic project:

- *IF* The Teachers Guild and the Design for Learning studio extend their strengths in creativity and innovation with their traditional client base of foundations, nonprofits, and public and private schools in higher-income communities...<sup>6</sup>

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<sup>6</sup> The range and distribution of the Guild’s and D4L’s clients are discussed further in the *Evidence to Date*, *Analysis of the Strategic Project*, and *Implications for Site* sections later in this capstone.

- *BY* keeping data-driven discussions of representation of race, income, and school type as a regular focal point of the Guild's and D4L's growth planning...
- *AND BY* purposefully complementing design thinking with change management through fostering relationships and structures that ease and accelerate organizational change...
- *AND BY* designing explicit linkages between teachers, school leaders, and district colleagues...
- *THEN* the Guild and D4L will increase the reach, lifetime, perseverance, and adoption of innovations in education.

In the parlance of Ganz's public narrative framework, my personal leadership purpose and theory of action constitute "stories of self" from which I seek to develop shared stories of "us" and "now."

## Description of the Strategic Project

The strategic project for this capstone was to develop—and begin the implementation of—a plan for The Teachers Guild's growth, and extend the resulting lessons from those efforts to the Design for Learning studio. The intent of this strategic project was to boost measurably the positive social progress that the Guild, D4L, and IDEO foster in the education sector. As previewed in the *RKA*, the PELP Coherence Framework and Ganz's public narrative framework organize the structure and analysis of the strategic project.

## Rationale for the Strategic Project

As previously described in the *RKA*, IDEO seeks to boost clients' creativity, innovation, and efficacy through its design expertise. While IDEO's (2016c) officially stated mission is to "create positive impact through design" (para. 2), its designers often conversationally interpret "creat[ing] positive impact" as catalyzing "*disproportionate* impact." For D4L—whose clients are mission-oriented and whose projects focus on social indicators rather than financial metrics—its leadership anecdotally interprets "creat[ing] positive impact" in this context as encouraging "social progress" (A. Diefenthaler, personal communication, October 27, 2016). The notions of "positive impact" and "social progress" provided common vocabulary for shared stories in the context of Ganz's public narrative framework.

With this context considered, D4L and The Teachers Guild seek not only to run financially sustainable businesses, but more importantly to maximize the positive social progress that their creative leadership and design expertise may encourage in the education sector. These aspirations for social progress and positive impact align with IDEO's theory of action, particularly IDEO's intent to help organizations innovate, grow, and launch new ventures. They also align with my theory of action—specifically my desire to increase the reach, lifetime, perseverance, and adoption of education innovations as a healthy response to the sector's desire for innovation (as reviewed in the *RKA*).

From The Teachers Guild's 2015 launch through the start of this strategic project in June 2016, the Guild cultivated an online community of roughly 5,000 educators interested in teacher-driven innovation.

Internally, this progress felt exciting as Guild members began to report positive anecdotal experiences: discrete “stories of self” that affirmed the Guild’s early hypotheses and suggested areas for future improvement. Externally, the Guild received acclaim for its potential to impact positively the education sector, ranging from former First Lady Michelle Obama (and her Reach Higher Initiative to expand college opportunity) to the Webby Awards (“honoring the best of the Internet”) (The White House, 2016; International Academy of Digital Arts and Sciences, 2016). These milestones and public celebrations began to shape an emergent “story of us” for the Guild as a community of teacher-innovators. While D4L and IDEO were encouraged by this positive momentum, they had not yet developed a forward-looking “story of now” for the Guild: that is, a specific perspective about the extent to which Guild may need to grow—and the population that the Guild would need to serve—in order to truly achieve positive social progress at scale (M. McMahon, personal communication, September 19, 2016).

The strategic project, therefore, was an opportunity to clarify IDEO’s specific vision of success for The Teachers Guild by 2020—fostering positive social progress through a design community for teachers with complementary resources, coaching, and experiences—with a more explicit path to achieve that vision.

## **Design of the Strategic Project**

In devising an implementation strategy for this growth plan, I distilled four design principles from Ganz’s public narrative framework and the PELP



Coherence Framework and employed them throughout the strategic project. Based on Ganz's public narrative framework, I: (1) led with shared stories to drive future evidence of success; and (2) built from small successes. Then, as suggested by the PELP Coherence Framework, I: (3) employed metrics to ground the work; and (4) used external accountability to maintain momentum.

**Lead with shared stories to drive future evidence of success.** Ganz's public narrative framework provides compelling encouragement to use shared stories in developing the Guild's growth plan. Comparing Ganz's framework to my professional experience, I have been fortunate to engage in a variety of organizational planning projects—including growth plans and strategic plans—in my career so far. Typically, two different approaches have shaped these projects:

- *A detail-driven, deductive approach.* Here, line-item details are identified, compiled, and mapped to an organization's mission, vision, guiding principles, and/or goals in order to produce a plan.
- *A story-driven, inductive approach.* In contrast, here high-level narratives are crafted in order to infer and/or elicit the supporting, lower-level details.

Of course, these approaches are not mutually exclusive, and a considered balance of both approaches is often employed.<sup>7</sup> That said, my prior experience suggests that each organization and project tend to gravitate to one of the two approaches.

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<sup>7</sup> Johnson (1992) expounds on this kind of balance as "polarity management."

For this strategic project, I expected and designed implementation to lead with stories. Three rationales—based in the organization, personal development goals, and the literature, respectively—guided this choice:

- *IDEO's organizational culture.* As discussed in the *RKA*, IDEO (2016b) prides and markets itself as a “pioneer of human-centered design” (para. 17). As identified in their theory of action, by “putting people at the center of our work,” IDEO uses stories of individuals to humanize its projects, facilitate empathic collaboration, help others envision an unknown future, and offer a path to reaching that future vision. IDEO expresses some of its key know-how in the various “faces” and “personalit[ies]” that innovators may adopt to advance their creativity (Kelley & Littman, 2005). Culturally, stories are expected, valued, and resonant at IDEO.
- *Personal learning goals.* At this point in my education leadership journey, I recognized that I was more skilled and comfortable with detail-driven approaches than with story-driven approaches. I appreciated that I might access additional leadership efficacy and enrich my capacity to deepen relationships by bolstering my story-driven skills, and I admired the facility of other visionaries with whom I have worked who lead with stories. With this in mind, I purposefully selected IDEO as a capstone organization—and more broadly, decided to pursue doctoral studies—in order to practice, refine, and deepen my ability to lead with stories.
- *Current management literature.* As reviewed in the *RKA*, Ganz's public narrative framework identifies the value of shared stories in public

leadership. Other scholars—such as Kouzes and Posner (2009)—further affirm the value of jointly creating shared visions, and using stories as a leadership pathway to achieving such future visions.

It is worth clarifying that stories are not the *whole* substance of this strategic project's efforts. Rather, they provide shared, resonant points of *entry*. IDEO's theory of action is aligned with stories, particularly its empathetic quest to appreciate human needs and to imagine solutions for those needs that work well and feel good. The Teachers Guild sought to extend this human-centered design through explicit demonstration of the Guild's "outcomes" and "impact" (see Appendices B and F). Therefore, while stories offered points of *departure*, evidence of positive social progress served as the aspirational *destination*.

**Build from small successes.** From my earliest orientations to the organization, my IDEO mentors coached me to use working prototypes (as opposed to conceptual discussions) as vehicles to engage, rally, and inspire colleagues (A. Diefenthaler & M. McMahon, personal communication, June 14, 2016). In the spirit of IDEO's (2013) values to "collaborate" and "talk less, do more," the strategic project was structured to deliver successes within the narrower scope of The Teachers Guild, then build upon these smaller successes in the broader scope of D4L (Ries, 2011). This approach aligned with IDEO's theory of action in its use of design tools and pattern recognition in order to build systems for innovation.

This approach also aligned with the “story of us” in Ganz’s public narrative framework. By building from smaller successes to larger opportunities, this strategic project sought to cast “us” first as the Guild, and then expand toward D4L with an eye toward IDEO’s broader work. As Ganz (2011) suggests, this approach also sought to make use of shared “choice points... challenges faced, the outcomes, and the lessons [] learned” in building “stories of us” around incrementally larger experiences (p. 286).

**Employ metrics to ground the work.** While stories facilitated access to the “heart” of this strategic project, metrics helped structure its “head” and “hands” (using Ganz’s parlance). Consequently, metrics comprise much of the strategic project artifacts reflected later in the *Evidence to Date*.

As a creative, improvisational organization that values shared stories, IDEO’s experience historically tended to be substantiated more often by anecdotes than by metrics (M. McMahon, personal communication, February 6, 2017). However, the education sector reasonably expects data-driven evidence as responsible justification for scaling education policies (Campbell, 1969). With this in mind, IDEO may further boost its external credibility in the education sector by complementing case studies of educator success with supporting evidence. The PELP Coherence Framework’s constituent elements (e.g., “instructional core,” “strategy,” “systems”) may be used to: (1) verify appropriate *coverage* of such evidential metrics; and (2) assess the *alignment* of discrete evidence in the context of a whole, coherent instructional improvement strategy. Additionally,

the use and importance of metrics were reflected in my theory of action's call for data-driven discussions throughout this strategic project.

**Use external accountability to maintain momentum.** Externally, the PELP Coherence Framework identifies “stakeholders” as an important design element of instructional improvement programs, particularly as such programs interface with their surrounding financial, political, and regulatory “environment.” Such stakeholder demands—a desire for creativity and innovation, within the context of inclusion and continuity—interacted with and informed IDEO’s theory of action and aspirations.

Internally, Kelley and Kelley (2013) suggest that IDEO holds creativity as its most cherished belief, finding purpose in bolstering “creative confidence” and “unleashing the creative potential within us all.” IDEO’s working theory of action—as inferred in this capstone—is based on their text and reflects the primacy of imagining new solutions. To that end, as explored in the *RKA*, IDEO organizes its work to “build[] learning platforms and tools to unlock creativity” (2016b, para. 5) and codifies its organizational values in a *Little Book of IDEO* (2013) in order to “nurture creative culture” (2016b, para. 19).

The PELP Coherence Framework reminds education leaders that while stakeholder demands require attention, the most important stakeholder demands are well-aligned with a coherent instructional improvement strategy. Often, coherence is facilitated by an appropriate degree of consistency and continuity. Fullan (2001) cautions that while the education sector is intrigued by creativity and innovation:

“The goal is not to innovate the most. It is not enough to have the best ideas.” (p. 34)

Vranek, Ferrer, and Rubalcaba (2015) challenge educators “to think of follow-through as the new innovation” (p. 1). Fullan (2001) explains the education sector’s need for continuity:

“One of our most consistent findings and understandings about the change process in education is that *all* successful schools experience ‘implementation dips’ as they move forward. The implementation dip is literally a dip in performance and confidence as one encounters an innovation that requires new skills and understandings.” (p. 40, emphasis in original)

Consequently, frequent, *incoherent* education innovations may result in continually suppressed performance. This does not leave us with a dichotomous choice between consistency and creativity; between continuity and innovation. Rather, both polarities must be managed purposefully to encourage performance breakthroughs: “The idea in changeover ideally combines continuity *and* innovation” (Fullan & Quinn, 2016, p. 128, emphasis in original).

While IDEO’s value priorities (i.e., creativity, innovation) are not necessarily at odds with those of the larger education sector (i.e., inclusion, continuity, consistency), the larger education sector’s value priorities require more purposeful consideration from IDEO. This is a classic adaptive gap as described by Heifetz (1994):

“Adaptive work consists of the learning required to address conflicts in the values people hold, or to diminish the gap between the values people stand for and the reality they face. Adaptive work requires a change in values, beliefs, or behavior. The exposure and orchestration of conflict—internal contradictions—within individuals and constituencies provide the leverage for mobilizing people to learn new ways.” (p. 22)

In order to scaffold IDEO's adaptive journey to merge its distinctive organizational offering (i.e., creative leadership) with the broader education sector's desire for the sustenance of new ideas, I articulated my theory of action to straddle this adaptive gap.

External accountability is used purposefully in this strategic project to motivate and reinforce IDEO's adaptive journey. As described by *RKA* literature, I used such external visibility as an organizational, political strategy (per Kotter (1995)) to mitigate some of the possible social resistance and preview some of the potential future benefits from adaptive journeys (per Granovetter (1978)). In the PELP Coherence Framework's parlance, I:

- Used commitments to "stakeholders;"
- To maintain the pace of IDEO's "strategy;"
- In service of improvements to the "instructional core;"
- In a manner coherent with my instructional improvement strategy (i.e., my theory of action).

Where possible, I took advantage of externally-facing deliverables and relationships to encourage The Teachers Guild and the Design for Learning studio to assess their attention to racial and socioeconomic inclusion as well as the sustenance of innovations that they help to bring about. For example, I positioned project deliverables for national education foundations, fundraising discussions, and external impact reports as ideal opportunities for The Teachers Guild and D4L to discuss their progress against my theory of action, particularly

with respect to managing change, socioeconomic inclusion, racial diversity, and cross-role linkages among educators (IDEO & The Teachers Guild, 2016).

I acknowledge that this was, in part, a technical solution; and I embrace Heifetz et al.'s (2009) caution that "[t]he most common leadership failure stems from trying to apply technical solutions to adaptive challenges" (p. 71). I also appreciated that I "cannot [individually] control the outcome" of IDEO's adaptive journey through a "clear, linear path to [its] resolution" (p. 31). Instead, I endeavored to use externally-facing interactions as opportunities to "seek out, surface, nurture, and then carefully manage the conflict" (p. 151) between the values that have served IDEO historically well and the broader education sector's needs, and "give [this] work back" to The Teachers Guild and D4L "at a rate they can stand" (Heifetz, 1994, p. 128). Indeed, as Figure 4 depicts below, IDEO's (2013) own visual metaphor for its organizational value of "learn[ing] from failure" is a designer stirring the proverbial pot of experience, Zen-like in spite of the heat of uncertainty and conflict. IDEO's visual metaphor strongly parallels Heifetz's (1994) language to "keep the heat up without blowing the vessel" (p. 128) when addressing adaptive challenges.



Figure 4: IDEO's "Learn from Failure" Value, Depicted Visually (Brown, 2013)



In short, I designed purposefully this strategic project to use externally-facing interactions as regular prods for IDEO along its adaptive journey relative to my theory of action.

### Arc of the Strategic Project

In the spirit of entering with stories in order to drive subsequent evidence, I executed the strategic project by eliciting and capturing shared, future visions of aspirational success for The Teachers Guild—in Ganz’s parlance, “stories of us.” I then built on this shared vision, using it as context to drive toward a more detailed growth plan and an aligned system of assessment data: the Guild’s “story of now,” complete with Ganz’s (2011) defining feature of

the “hope” of “a credible vision of how to get from here to there” (p. 287).

The Guild team captured an evidential baseline relative to this new program evaluation model. Finally, I supported the Guild team in implementing and refining initial components of the growth plan and program evaluation system.

As this arc progressed for The Teachers Guild, a similar one unfolded for the Design for Learning studio. D4L leadership captured shared stories of future success and used them to articulate business development targets for D4L’s future client and project portfolio. A D4L colleague and I then synthesized data-driven snapshots of D4L’s historical work, enriching the studio’s shared stories with evidence about their prior successes and future areas for growth. This evidence was intended to contribute urgency and rigor for the D4L team around the studio’s opportunities for improvement, leading into future D4L story development beyond the scope of this strategic project.<sup>8</sup>

Below, Table 1 summarizes the arc of the strategic project by identifying its activities, timeframes, and key resulting artifacts. These artifacts are discussed further in the *Evidence to Date* and *Analysis of the Strategic Project* sections later in this capstone.

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<sup>8</sup> Actual results from this effort cannot be assessed until after this capstone’s publication date.

Table 1: Overview of Strategic Project Milestones

Timeframe	The Teachers Guild Activities	Design for Learning Activities	Resulting Appendices	
August 2016 – September 2016	Develop impact model for the Guild.		B	Guild forward-looking impact model
	Connect Guild impact model to Guild fundraising targets and external development discussions.		C	Guild <i>pro forma</i> financial analysis
			D	Guild fundraising pitch book
	Deliver Integration Design Consortium project with Carnegie Corporation of New York.		E	Carnegie Integration Design Consortium report
November 2016	Develop program evaluation model for the Guild.		F	Guild program evaluation model
January 2017 – February 2017	Capture baseline data relative to new Guild program evaluation model.		G	Guild retrospective impact report
	Assess early impact of the Guild's first 18 months of work and articulate focus for next three years of work.			
		Articulate forward-looking, aspirational targets for D4L's future work.		

<b>Timeframe</b>	<b>The Teachers Guild Activities</b>	<b>Design for Learning Activities</b>	<b>Resulting Appendices</b>	
March 2017	Begin implementing Guild impact model, program evaluation model, and growth plans.			
March 2017 – April 2017		Bolster forward-looking D4L aspirations with retrospective data about historical D4L projects.	H	D4L business development data
April 2017 and beyond		Articulate story-driven business development tools for D4L.	<i>(Beyond the scope of this strategic project.)</i>	

## Evidence to Date

Artifacts presented in this section demonstrate that IDEO and I made observable progress against my theory of action during the scope of this strategic project. While it is too early to judge The Teachers Guild's and D4L's success on the ultimate aim of my theory of action—increasing the reach, lifetime, perseverance, and adoption of innovations of education—early indicators are directionally positive.

First, Table 2 below provides an overview of evidence from this strategic project. Table 2 enumerates and describes each artifact, identifies whether each artifact pertains to the Guild and/or D4L, delineates my role in the creation of each artifact, and connects each artifact to Ganz's public narrative framework and the PELP Coherence Framework as appropriate. The evidence presented in Table 2 mirrors the *Design of the Strategic Project* and *Arc of the Strategic Project* described in earlier sections: that is, entering with stories to drive subsequent evidence, and starting with the smaller scope of the Guild to work progressively to the larger scope of D4L.

After Table 2, each evidential artifact will be discussed in turn, with particular focus on its import to this strategic project, connections to the Ganz and PELP frameworks, and my role in the shared work.

Table 2: Overview of Evidential Artifacts

Appendix Code	IDEO Team(s)	Appendix Description	My Role in Implementation	Connections to Ganz Public Narrative Framework	Connections to PELP Coherence Framework
A	Guild	Historical data	None (produced before strategic project).		
B	Guild	Forward-looking impact model	<ul style="list-style-type: none"> <li>• Co-framed with Guild director.</li> <li>• Led synthesis and production with input from Guild team.</li> </ul>	Story of Us	Strategy
C	Guild	<i>Pro forma</i> financial analysis	Supported Guild intern, who led synthesis and production.		Resources
D	Guild	Fundraising pitch book	<ul style="list-style-type: none"> <li>• Guild business development associate led synthesis and production.</li> <li>• This appendix integrates and reflects shared stories that I shaped in Appendix B.</li> </ul>	Story of Now	
E	D4L and Guild	Carnegie Integration Design Consortium report	Co-framed and co-produced with D4L portfolio director, two D4L senior design leads, and Guild director.	<ul style="list-style-type: none"> <li>• Story of Us</li> <li>• Story of Now</li> </ul>	Stakeholders
F	Guild	Program evaluation model	<ul style="list-style-type: none"> <li>• Co-framed with Guild director.</li> <li>• Led synthesis and production with input from Guild team.</li> </ul>	Story of Us	Systems

Appendix Code	IDEO Team(s)	Appendix Description	My Role in Implementation	Connections to Ganz Public Narrative Framework	Connections to PELP Coherence Framework
G	Guild	Retrospective impact report	<ul style="list-style-type: none"> <li>• Co-framed with Guild director and Guild fundraising consultant.</li> <li>• Led synthesis and production with input from Guild team.</li> </ul>	Story of Now	<ul style="list-style-type: none"> <li>• Stakeholders</li> <li>• Resources</li> </ul>
H	D4L	Retrospective business development data	<ul style="list-style-type: none"> <li>• Co-framed and co-produced with D4L portfolio director and D4L business development associate.</li> <li>• Studio aspirations (articulated separately by the D4L managing director) provided the entry point for the evidence provided in this work.</li> </ul>		<ul style="list-style-type: none"> <li>• Resources</li> <li>• Systems</li> </ul>

Appendix A provides historical context for the strategic project and its theories of action. Data gathered between 2015 and June 2016 illustrate that The Teachers Guild’s evidence-based insight was limited to measures of financial health (e.g., “Can we remain in business?”) and first-order user engagement (e.g., “How many users are in our community, and how active are they?”). The historical data in Appendix A do not yet reflect considerations of change management, socioeconomic inclusion and racial diversity, cross-educator linkages and integration, or envisioning more desirable future possibilities and the paths to realizing them—illustrative aspects of IDEO’s and my theories of action. Appendix A therefore illustrates The Teachers Guild’s opportunities for improvement in this strategic project.

Appendix B (the “Guild impact model”) captures a vision of future success for the Guild as of August 2016. I led the production of the impact model, co-framing it with the Guild director, synthesizing it in close collaboration with the Guild team, and using shared language and stories to lead the Guild on its first steps relative to my theory of action.<sup>9</sup> Specifically, the impact model reflects the Guild’s earliest designs toward socioeconomic inclusion and racial diversity

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<sup>9</sup> As an artifact from earlier in the strategic project, Appendix B is more closely connected with IDEO’s theory of action than my theory of action. For example, IDEO’s value for human-centered solutions manifests in the Guild impact model’s call for education reforms to be “designed and led by” teachers rather than “imposed on them.” IDEO’s desire to use “the tools and mindsets of design practitioners” is reflected in the Guild impact model’s language to “do design thinking and build creative capacity.” Finally, IDEO’s values of helping individuals envision a desirable future state, the path toward that future state, and “embed[ding] innovation into the fabric” of organizations is reflected in the Guild impact model’s “outcomes” and “impact” language.



(reflected in the Guild’s focus on “our diverse students’ evolving needs”) and perseverance and adoption of education innovations (reflected in the Guild’s aspirations for a “system [that] adopts and welcomes teacher innovations”). Through its collaborative creation, the impact model represents a “story of us” (per Ganz) through shared values, articulates a forward-looking strategy coherent with my theory of action (per PELP), and establishes the forward-looking context in which subsequent Guild evidence is then situated.

Appendix C (a *pro forma* financial analysis) then quantifies the order-of-magnitude financial resources (per PELP) required — whether through philanthropy or earned income—to realize the Guild impact model from Appendix B. These financial estimates motivated a fundraising campaign for the Guild, which was structured and facilitated by the “pitch book” provided in Appendix D. While I did not lead the development of Appendices C and D, they are noteworthy for this strategic project as they illustrate the Guild team taking up and using stories and language that I shaped in the Guild impact model and integrating them into subsequent, shared work led by other Guild team members.

Appendix D (the “Guild fundraising pitch book”) also illustrates the Guild team’s refined and strengthened language around socioeconomic inclusion and racial diversity. For example, the pitch book forecasts the Guild’s desire to “deepen our relationships with school districts, communities of color... [and] diverse schools and communities.” The pitch book also evidences the Guild’s first prototype for cross-role educator linkages in its design collaboration

with Spring Branch Independent School District.<sup>10</sup> In doing so, the pitch book reflects “stories of now” (per Ganz) in its calls to action.

Appendix E is an executive summary excerpt from a report that D4L and the Guild jointly produced with the Carnegie Corporation of New York in September 2016. In framing the project, Carnegie (2016) lamented that education reforms are “being developed and implemented in isolation,” and the resulting “lack of integration in the design of education reform create[s] inefficient and often ineffective approaches to implementation... [and] constrains the potential impact of the reforms” (p. 1). In response to this “fragmented and siloed” experience, Carnegie convened eight education advisory organizations—including IDEO—as an “Integration Design Consortium” and issued the following charge:

“Carnegie Corporation of New York is therefore pursuing strategies to encourage *integration*, or the emergence of new practices and understandings that enable greater collaboration, coherence, and dynamism across the U.S. education system.” (p. 1, emphasis in original)

As a member of the Integration Design Consortium, a joint D4L/Guild team explored how integration might be better encouraged across the U.S. education system.<sup>11</sup> I was part of the IDEO team, co-framing and co-producing Appendix E with D4L and Guild colleagues. In doing so, we advanced two

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<sup>10</sup> The Teachers Guild’s collaboration with Spring Branch Independent School District is discussed further in the *Analysis of the Strategic Project* section later in this capstone.

<sup>11</sup> Carnegie Corporation of New York’s Integration Design Consortium is discussed further in the *Analysis of the Strategic Project* section later in this capstone.

elements of my theory of action: change management and cross-role educator linkages. The Integration Design Consortium report sought to facilitate change by designing purposefully for the kinds of educator relationships that foster what Bryk and Schneider (2002) call “relational trust” (p. 12). The report also supported educator linkages by envisioning “teachers... on the same team with principals and district leaders... aligned around a common vision.” Appendix E therefore identified stakeholder interactions (per PELP) coherent with and supporting my theory of action, and reflected “stories of us” and “stories of now” (per Ganz) through shared values and calls to action. As a joint effort between D4L and the Guild, the Integration Design Consortium report shaped and informed future work for both teams.

Appendix F (the “Guild program evaluation model”) provides the heart of the strategic project’s evidence for the Guild. Developed in November 2016, I led the production of this document in close collaboration with the Guild team. Similar to the Guild impact model (Appendix B), I used shared “stories of us” (per Ganz) to evolve the Guild’s vision of future success. These stories then structured an aligned system (per PELP) of qualitative and quantitative evidence that may be gathered in the future to evaluate the Guild’s progress toward its vision of future success. The program evaluation model codified my theory of action in the Guild’s ongoing operations. Specifically, socioeconomic and racial representation, educator-to-educator relationships, and cross-role educator linkages are all explicitly assessed under the Guild program evaluation model. Whereas this strategic project’s earliest artifacts (e.g., the impact model in Appendix B) integrated more closely with IDEO’s theory of action, the program

evaluation model aligned tightly with my theory of action without forgoing IDEO's theory of action, demonstrating and substantiating the arc of progress in this strategic project.

Soon after developing the program evaluation model, The Teachers Guild team established an evidential baseline for its work. In early 2017, the Guild's program designer and digital strategist considered available evidence against the newly developed program evaluation model to assess the Guild's current progress toward its aspirations. Statistics available to the Guild about its members included gender, U.S. state of employment, grade level taught, subject area taught, and years of teaching experience (B. Brownell, personal communication, February 23, 2017). The Teachers Guild was also able to assess relative levels of its members' participation among the Guild's various design collaborations and the constituent steps in each design collaboration (E. Scripps & B. Brownell, personal communication, December 8, 2016). These statistics indicated that, as of early 2017, the Guild's teacher-members tended to skew disproportionately toward teaching technology-related subjects and working in California—likely interrelated considerations given the technology sector's influence and familiarity with design thinking in California and particularly the San Francisco Bay Area (B. Brownell, personal communication, February 23, 2017). Additionally, relative to national averages, The Teachers Guild's members were more likely to be male (roughly 40 percent on the Guild versus 24 percent nationally) and more experienced teachers—roughly 68 percent of Guild teachers had at least ten years of teaching experience, as compared to roughly 56-59 percent of public and private PK-12

teachers nationally (B. Brownell, personal communication, January 19, 2017; National Center for Education Statistics, 2014; National Center for Education Statistics, 2012). To date, The Teachers Guild had not yet tracked as part of its technological platform whether its teacher-members work in public or private schools, the socioeconomic profiles of the communities where its members work, and the racial and ethnic distribution of its members. However, the experience of the Guild’s program designer, digital strategist, and director—working directly and regularly with its teacher-members—evidenced anecdotally that The Teachers Guild’s members tended to work in public and private schools that serve higher-income communities (E. Scripps & B. Brownell, personal communication, December 19, 2016).

This evidential baseline suggested opportunities for the Guild to enhance its positive social progress by first tracking and then, importantly, engaging a more representative community of PK-12 educators in public schools serving more socioeconomically diverse school communities. The Guild’s program evaluation model (Appendix F) provides a roadmap for the Guild to enhance its data collection and guide its ongoing assessment in support of its aspirations.

Appendix G (the “Guild impact report”) closed out the Guild’s efforts in the scope of this strategic project, developed in February 2017 looking retrospectively at the Guild’s 18 months of start-up activity. I led the production of this report, co-framing it with the Guild director and a fundraising consultant and synthesizing the resulting document in close collaboration with the Guild team. The impact report was the Guild team’s first public use of the program evaluation model (Appendix F), prototyping the system within the

aforementioned constraints of limited current data. Additionally, the impact report was developed to support fundraising resources (per PELP) and engage current and new championing stakeholders (per PELP) that align with and enable the Guild's instructional improvement strategy.

The impact report refined the Guild's "story of now" (per Ganz) and public commitments across all dimensions of my theory of action. First, the Guild extended in its forward-looking plans its commitments to socioeconomic inclusion and racial diversity. For example, while this strategic project's earliest artifact (the Guild impact model) identified "diverse students" more generally, the impact report highlighted more specifically "courageous discussions about race, immigration, religion, and privilege" between teachers and students (Singleton, 2015).<sup>12</sup> This enhances the Guild's goals to increase its reach with a stronger equity orientation. Second, the Guild recognized the facilitative potential for change by publicizing the results of its district-wide collaboration with Spring Branch ISD. Finally, the Guild committed publicly to cross-role educator linkages in its forward-looking plans.

Shifting focus from The Teachers Guild, we complete the evidential arc of this capstone by opening the aperture from just the Guild to consider the overall Design for Learning studio. First, in January-February 2017, D4L's managing director articulated a set of forward-looking aspirations for the Design for

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<sup>12</sup> To be clear, I do not mean to suggest that I was solely responsible for more prominent discussion of race and class in The Teachers Guild and Design for Learning. Additional colleagues in both organizations advocated similarly. The November 2016 presidential election catalyzed additional attention, willingness, and urgency in the Guild and D4L to engage considerations of race and class.

Learning studio. These “stories of us” (per Ganz) oriented a shared experience for the studio around cross-cutting “causes,” with a “story of now” (per Ganz) and an aligned strategy (per PELP) for the studio’s future work (S. Speicher, personal communication, January 17, 2017). These forward-looking aspirations established targets for the D4L studio and context for subsequent D4L efforts.

Appendix H (“retrospective D4L business development data”) offers evidence to consider D4L’s forward-looking plans in light of its historical experience. I co-framed and co-produced these data with D4L’s portfolio director and business development associate in March-April 2017 to support the D4L business development team’s efforts in expanding D4L’s portfolio of clients and projects. These retrospective data identify D4L’s direct clients<sup>13</sup> from 2013 through 2016. On average:<sup>14</sup>

- The majority were foundations and nonprofits (roughly 35 percent were foundations and roughly 20-25 percent were nonprofits);
- Roughly 20 percent were public schools,<sup>15</sup> districts, and agencies;
- Roughly 10 percent were corporations and for-profit organizations; and
- Roughly 10 percent were private schools.<sup>16</sup>

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<sup>13</sup> Here, “direct clients” represent those organizations that hire and fund D4L projects.

<sup>14</sup> These retrospective D4L client data are averages over the four-year period from January 2013 through December 2016. The data distributions do not vary significantly when analyzed by project or by revenue. Additionally, the data distributions do not vary significantly between years during the 2013-2016 span.

<sup>15</sup> D4L’s public education clients comprise PK-12 schools, PK-12 school districts, charter management organizations (CMOs), and institutions of higher education.

<sup>16</sup> D4L’s private education clients span both PK-12 and higher education.

Of D4L's overall project portfolio from 2013 through 2016, on average roughly half of the portfolio was designed specifically to serve low-income communities. D4L's strong, historic relationships with foundations and nonprofits expanded the scope of D4L's work in the service of low-income communities beyond what would otherwise be enabled by the relatively smaller portion of D4L's portfolio delivered to public education agencies as direct clients.

Of D4L's foundation-funded projects from 2013 through 2016, on average:

- Roughly half were intended to serve a mixed, sector-wide audience across U.S. public and private education;
- Roughly 20 percent were designed specifically to serve U.S. public schools and agencies; and
- The remainder were intended to serve schools located internationally or for internal foundation use.<sup>17</sup>

These retrospective D4L data connected to my theory of action by elevating socioeconomic and school type representation in D4L planning. These retrospective D4L data also illustrated opportunities for D4L to enhance its efficacy relative to its aspirations by increasing engagement of public schools and public education agencies, as substantiated by the *Demographics and Impact* section of the *RKA*. D4L's historically strong engagement of foundations and nonprofits offers an opportunity in this regard, as D4L may build on its

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<sup>17</sup> Again, these data distributions do not vary significantly when analyzed by project or by revenue, or when analyzed by year.



reputation and relationships with foundations and nonprofits to shape an agenda of work toward public education organizations with more racially and socioeconomically diverse populations.

Below, Table 3 summarizes the connections just discussed between the strategic project's evidence-to-date and my theory of action. As noted at the beginning of this section, it is too soon to issue an evidence-based judgment of The Teachers Guild's and D4L's ultimate efficacy in increasing the reach, lifetime, perseverance, and adoption of innovations in education. Table 2 and Table 3, however, indicate that the Guild, D4L, and I achieved demonstrable progress against my theory of action during the scope of this strategic project. This evidence suggests that the survival, sustenance, and growth of educator-created innovations—as identified in this capstone's essential question—may be enhanced through identifiable leadership moves implemented during practically feasible timeframes.

Table 3: Summary of Evidential Impact on My Theory of Action

Theory of Action Element	Appendices Where Implemented		Extent That Theory of Action Element Was Achieved
<i>IF</i> the Guild and D4L extend their strengths in creativity and innovation with their traditional client base of foundations, nonprofits, and public and private schools in higher-income communities...	A	Guild historical data	N/A
	H	D4L business development data	N/A
<i>BY</i> keeping data-driven discussions of representation of race, income, and school type as a regular focal point of the Guild's and D4L's growth planning...	B	Guild forward-looking impact model	<ul style="list-style-type: none"> <li>• Initial Guild design for socioeconomic inclusion and racial diversity</li> <li>• Initial Guild design for perseverance and adoption of education innovations</li> </ul>
	D	Guild fundraising pitch book	Socioeconomic inclusion and racial diversity reflected in specific future Guild plans
	F	Guild program evaluation model	Socioeconomic inclusion and racial diversity reflected in Guild's vision of future success, and assessed explicitly in program evaluation metrics
	G	Guild impact report	Socioeconomic inclusion and racial diversity reflected in specific future Guild plans
	H	D4L business development data	Socioeconomic variety and school type variety are explicitly assessed

Theory of Action Element	Appendices Where Implemented		Extent That Theory of Action Element Was Achieved
<i>AND BY</i> purposefully complementing design thinking with change management through fostering relationships and structures that ease and accelerate organizational change...	E	Carnegie Integration Design Consortium report	Suggests designing specifically for educator relationships reflecting trust and connection
	F	Guild program evaluation model	Explicitly assesses educator-to-educator relationships in Guild program evaluation metrics
	G	Guild impact report	Successful Guild collaboration with Spring Branch ISD builds momentum for similar, future collaborations
<i>AND BY</i> designing explicit linkages between teachers, school leaders, and district colleagues...	D	Guild fundraising pitch book	Initial Guild design for cross-role educator linkages through collaboration with Spring Branch ISD
	E	Carnegie Integration Design Consortium report	Calls for teams that explicitly engage teachers, school leaders, and district colleagues around a shared purpose
	F	Guild program evaluation model	Explicitly assesses cross-role educator linkages in Guild program evaluation metrics
	G	Guild impact report	Cross-role educator linkages reflected in specific future Guild plans
<i>THEN</i> the Guild and D4L will increase the reach, lifetime, perseverance, and adoption of innovations in education.	G	Guild impact report	Future Guild plans will explicitly assess the adoption of teacher-created innovations
	N/A		<i>(D4L's and Guild's eventual success to be assessed in the future)</i>

## Analysis of the Strategic Project

In considering why the strategic project unfolded as it did, the capstone's theories of action—as well as the PELP Coherence Framework and Ganz's public narrative framework—organize the analysis. First, IDEO's and my experience in the strategic project illustrated that IDEO's theory of action critically enables the organization's prowess in empathic design but does not naturally encourage the organization to attend to change management and cross-role linkages. Second, personnel, political, financial, and externally-facing considerations of the strategic project reflected the PELP Coherence Framework's "culture," "structure," "resources," and "stakeholders" elements for instructional improvement programs. Finally, in the parlance of Ganz's public narrative framework, shared "stories of us" enabled the strategic project's "story of now," motivating the strategic project's work.

**In focusing attention primarily on users, IDEO's theory of action deprioritized for the Guild systemic factors surrounding the teachers for whom the Guild designs. In the context of this strategic project, muted success in that model was a key catalyst for the Guild's engagement of my theory of action.** As previously analyzed, IDEO's theory of action focuses most primarily on human-centered creativity. This focus enables IDEO to be a market leader in empathic, user-focused design (American Broadcasting Company, 1999), particularly given its well-practiced attention to "human needs," intuition, and "emotional[] meaning[]" (Kelley & Kelley, 2013, pp. 24-25).

Further considering IDEO's theory of action, in a recent "town hall" discussion, IDEO founder David Kelley mused about the influence that Bandura's self-efficacy research had on his own leadership perspectives (D. Kelley, personal communication, October 27, 2016). This influence can be seen in IDEO's theory of action, and consequently in The Teachers Guild's early program design—human-centered values and a desire to foster self-efficacy suggested the primacy of building teachers' capacity in re-imagining and reshaping teachers' experience.

For the Guild, this manifested in an initial program design that engaged teachers exclusively. Its design collaborations, coaching, online community, and technology platform were tailored to supporting teachers and fostering teacher-to-teacher dialogue. As a result, the Guild's implicit hypothesis was that scaffolding teachers toward successful implementation of laboratory-scale ideas would be sufficient to create momentum for system-scale shifts. An unintended consequence of IDEO's theory of action, manifested in the Guild's early focus on teachers at the exclusion of complementary actors, was to attenuate the potential impact of ideas created by Guild teacher-members. That is, IDEO's concentrated focus on the user—the person, and her human experience as the driver of the solutions that IDEO designs—drew the Guild's awareness away from systemic factors that may be integral in shaping or defining the user's experience. In the Guild's context, such factors—such as the incentives and pressures experienced by some school leaders and the resulting constriction of the teachers whom they supervise—impinged negatively on and were not yet accounted for in the

Guild's program design. These kinds of unintended consequences are what Senge (2006) cautioned in "systems thinking."

From its first eighteen months, the Guild team appreciated more experientially that enhancing teachers' innovation required not only a strong creative development experience, but also local support (M. McMahon, personal communication, September 19, 2016; March 27, 2016). As discussed earlier in the *RKA*, good ideas often are not enough (Kotter, 1996; Kanter, 1983), and "cage-busting" (Hess, 2015a) appears to require more than independent initiative and effort. While the Guild made commendable progress bolstering teachers' capacity to design ideas, launch ideas, and rally others around the trial and early adoption of those ideas, some Guild teacher-members encountered subsequent resistance when seeking to implement their innovations more broadly in their school or district. These experiences helped the Guild understand that building teachers' capacity for creative leadership solely through teacher-focused initiatives could yield meaningful *personal* impact but attenuated *sector-level* impact.

This gap between expectations and experience offered a toehold for my theory of action by establishing the necessary "sense of urgency" (per Kotter (1995, p. 61)) and "power sources" (per Kanter (1983, p. 209)) to advance my vision. Considering an illustrative, contrasting example toward the end of this strategic project, The Teachers Guild more recently explored integrative approaches facilitating the change associated with teacher-created ideas by linking educators across roles. In a recent design collaboration to enhance learning in science, technology, engineering, and math (STEM), the Guild

collaborated with Spring Branch Independent School District in Houston, TX. The Guild included Spring Branch in its broader creative community, and Spring Branch organized its experience with the Guild across its district, schools, and teachers, with sponsorship from an associate superintendent and dedicated support from district staff. The Guild and Spring Branch jointly shaped and executed the Guild's creative leadership experience for teachers within that district.

As a result, in Spring Branch, collaboration across schools and roles (i.e., teachers, principals, and district staff) reduced barriers to and accelerated the Guild's initiatives. As one illustrative point of evidence, of the 67 teacher-generated ideas developed in the Guild's STEM design collaboration, and of the eleven "favorites" that were selected by the broader Guild community, five of the "favorites" were developed by Spring Branch teachers (Witney & Rossacci, 2017). That is, Spring Branch's teachers garnered 45% of the top-rated ideas in the Guild's STEM collaboration—disproportionately high representation when compared to their relative population in the Guild community. The Guild's experience in Spring Branch offered reinforcing evidence for my theory of action, and bolstered the credibility and momentum necessary to shape the Guild's and D4L's future work, as reflected in the shifts from Appendices A and B to Appendices E, F, and G.

**Small, fluid teams; vibrant organizational culture; and minimal politics accelerated the strategic project.** While any organization has political dynamics to navigate, those of IDEO, The Teachers Guild, and the Design for Learning

studio were minimally obtrusive in the context of this capstone. This supported the fast pace and collegial spirit of the strategic project. The PELP Coherence Framework identifies “structure” and “culture” as key organizational elements that shape instructional improvement programs. Additionally, the *Innovation in Educational Discourse* section of the RKA observed that the current structure and culture of public school teaching may be *impediments* for education innovation. In this capstone’s context—at IDEO, particularly with the Guild and D4L—structure and culture were key, aligned *assets* in accelerating the strategic project.

These structural and cultural assets were driven by IDEO’s relatively modest size and its organization among studios and “creative products and services.” Structurally, while IDEO is 25 years old, it is not a large company, employing 650 colleagues across nine locations and several “creative products and services.” Organizing itself around locations, studios, “creative products and services,” and functions helps keep teams small and fluid, and enhances the opportunity for individual employees to feel situated and connected, rather than unmoored amidst a large, anonymous population. Further, as most IDEO employees’ day-to-day experience unfolds in project-focused consulting teams, colleagues are able to engage deeply with each other in small groups and rotate frequently among teams, maintaining some continuity with prior colleagues and enjoying opportunities to meet new ones.

IDEO’s culture is perhaps the most remarkably different aspect of my strategic project experience relative to my prior experience in education organizations. Education organizations to which I have had exposure tend to have cultures that are convergent, focused on solving problems with



critical attitudes. Here, I use “critical” not to suggest *ad hominem* fault-finding, but rather focused analysis in the pursuit of urgent solutions. In contrast, IDEO cultivates an astonishingly divergent, generative, and creative culture. Here, I use “creative” not just to capture the art of conceiving something new, but more importantly the attitude of continually imagining “what might be” together.

Much acclaim has been lauded on IDEO’s organizational culture, to the extent that it has become fodder for popular news (Sloan, 2009), the *Harvard Business Review* (Amabile et al., 2014), multiple Harvard Business School cases (Buell & Otazo, 2014; Thomke & Nimgade, 2000), blog articles (Chion, 2013), and internal artifacts such as the *Little Book of IDEO* (2013). IDEO’s culture is highly social (Chion, 2013), remarkably optimistic (IDEO, 2013), focused on creativity (Kelley & Kelley, 2013), and thrives on colleagues helping each other (Amabile et al., 2014). Together, IDEO’s structural design and cultural stewardship help employees feel known, seen, capable, and cared for.

Further, the Guild and D4L teams were willing and eager to engage the strategic project, demonstrating at best a strong appetite for the work and at least a receptive openness to entertain the work. This is important because, as Kotter (1995) observes, “getting rid of obstacles to change” and “changing systems or structures that seriously undermine the [change] vision” are critical enablers to “empowering others to act on [a] vision” and sustaining a change initiative (p. 61). Through the course of the capstone, I did not encounter overt resistance or outright obstruction to the strategic project. These positive political tailwinds significantly reduced the change management efforts required per

Kotter, contributing to and accelerating the strategic project's success.

Particularly when compared with my prior career experience working within larger, more mature organizations (where relationships have more interplay and history) and public agencies (with more onerous external demands and accountability),<sup>18</sup> IDEO is largely free of ossified political dynamics, and that is worthy of internal celebration, external acclaim, and ongoing stewardship.

Finally, from a personal learning perspective, minimal politics were exceptionally liberating as they minimized the friction that I needed to overcome in order to access and test the story-driven approaches that I expected at the heart of the strategic project.

**Financial considerations drove efforts aligned with my theory of action in the scope of this strategic project.** The Teachers Guild's fundraising needs provided a key point of leverage for me to advance this strategic project. The PELP Coherence Framework identifies "resources" as another enabling element for instructional improvement programs, and the Guild had immediate resource needs during the scope of the strategic project in order to remain solvent. Consequently, coupling my efforts with the Guild's development activities boosted the team's will for the work while bringing their efforts in closer alignment and coherence with my theory of action. In Moore's and

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<sup>18</sup> In the PELP Coherence Framework's parlance, more mature organizations exhibit more formalized "structure," which can also manifest in "systems" of talent processes and technological systems (Childress et al., 2011, pp. 7-9). Public agencies are more subject to "stakeholders'" demands and a more stringent operating "environment."

Khagram's (2004) parlance, financial resource needs provided the "authorizing environment" necessary for the "task environment" of my theory of action to unfold.

As I entered IDEO in June 2016, it was clear that The Teachers Guild would need to focus significant attention on development for the latter half of 2016. As previously noted in the *Organizational Context*, while the Guild is culturally and operationally close to D4L and IDEO, given its mission the Guild operates as a separate, standalone nonprofit organization. The Guild was launched in 2015 with a philanthropic grant, and its original business model was a service for the public good without pathways for earned revenue. By mid-2016, the Guild's development needs were existential, as it required additional funds to continue operating in 2017.

As a result, much of the vision, impact, and metric definition described in the *Arc of the Strategic Project* was closely coupled with the Guild's development needs. In doing so, I capitalized on the interests of prospective philanthropic donors' to bring the Guild's activities and focus in closer coherence with my theory of action, as expressed through the Guild's fundraising pitches (as in Appendix D). Prospective philanthropic donors' areas of inquiry aligned closely with my theory of action—as examples: What is the Guild's distinct value proposition? What eventual impact might the Guild hope to achieve? Whom would the Guild need to reach and engage in order to realize that impact? What success had the Guild accomplished so far, and what would need to be adjusted in the future in order to realize its aspirations? What resources would the Guild need to realize its aspirations?

These expected questions and conversations—along with the necessary preparations for the team—helped motivate the creation of Appendices B, C, D, E, F, and G. Comparing the interests and questions of potential funders with my theory of action also helps make apparent how the Guild’s development activities advanced discussions of diverse representation, cross-role collaboration among educators, and the sustenance of educator-driven innovations. Further, the kinds of philanthropic funders whom the Guild most intended to pursue were consistently keen to understand the Guild’s program evaluation approach (as in Appendix F). This funder interest dovetailed closely with part of the strategic project’s design to employ metrics to ground the work.

Fundraising activities facilitated not only the creation of key strategic project artifacts, but also the ongoing maintenance and refinement of these tools. The Guild’s philanthropic donors expect regular updates about its progress and impact achieved (as in Appendix G). As described in the *Design of the Strategic Project*, these periodic communications establish helpful external accountability to maintain focus and motivation relative to my theory of action (particularly its “data-driven” orientation). In Kotter’s (1995) parlance, I used financial considerations to “plan[] for and creat[e] short-term wins” that fostered “increased credibility” to “consolidat[e] improvements and produc[e] still more change” (p. 61). Indeed, positive progress with the Guild engendered credibility, curiosity, and conversation with the Design for Learning studio, particularly as the Guild’s director, D4L’s portfolio director, and D4L’s managing director met and co-planned weekly as a leadership team. This enabled access for me to begin connecting my theory of action with D4L’s business development efforts.

To IDEO's credit, before this strategic project, the D4L team had already started creating data-driven tools to drive their business development activities (as in Appendix H). Similar to my engagement with the Guild, I coupled my D4L efforts with its business development colleagues given their import to the studio's solvency and their direct influence over the shape of D4L's future work. My hope was to bring D4L's business development activities in closer alignment with my theory of action by encouraging more habitual consideration of diverse representation through D4L's clients, cross-role collaboration among educators, and the sustenance of educator-driven innovations.

*Beyond* the scope of this strategic project, it is worth noting that financial considerations can impede D4L's and the Guild's aspirations to engage public education organizations to a greater degree. For example, often more than 80 percent of public school districts' budgets are committed to salaries and benefits, and these personnel expenses are typically governed by collective bargaining agreements (Childress et al., 2011, p. 10). Discretionary budgets for public school districts are as a result relatively small, increasing the difficulty for D4L and the Guild to engage directly with public education organizations. Reflecting on a related, recent experience, the D4L portfolio director observed:<sup>19</sup>

"[A public school district] was interested in working with our [D4L] studio. They contacted us to explore how we might help them bring innovation to their district, as they recently passed a [several] million dollar bond to be invested in a new school building. But given public pressure and expectations, they found it difficult to carve out even [a small portion of those funds] to design

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<sup>19</sup> Confidential client details are redacted from this interview excerpt.

the strategy, the overarching approach, and the experience that would then invite people into and activate that new building.” (A. Diefenthaler, personal communication, March 2, 2017)

These budget realities for public education organizations pose legitimate challenges to D4L and the Guild; however, they are not insurmountable.

As discussed in the *Evidence to Date*, D4L has a demonstrable track record of success with foundations and nonprofits, on which the studio may build to influence and shape these organizations’ agendas toward public education entities. IDEO’s recent experience with Carnegie Corporation of New York offers a proof point that such advocacy is plausible and achievable: D4L and the Guild worked jointly for a foundation client, and their resulting deliverables are shaping that foundation’s future funding agenda with an eye toward public education improvements. Acknowledging that budget constraints may make public education organizations more difficult to engage directly, D4L has opportunities to circumvent creatively these constraints through its historical strengths.

*During* the scope of this strategic project, financial considerations served more as an enabler than a constraint for my theory of action. I was more successful in advancing The Teachers Guild than D4L along my theory of action, though both teams made positive progress. I assess that my effectiveness against my theory of action—using finances as a lever—was slower and more attenuated with D4L for two key reasons:

- *The Teachers Guild’s financial considerations were immediately existential, while D4L’s were less so.* While business development activities for a consulting organization are certainly necessary for that organization’s ongoing

sustainability, D4L had stronger prospective client interest over the course of this strategic project relative to the Guild's prospective funder interest. As a result, D4L's sense of financial urgency — while meaningful — was less acute than that of The Teachers Guild, who faced the potential of insolvency within the strategic project's timeframes.

- *The timing of my engagement with the Design for Learning studio lagged significantly that with The Teachers Guild.* As Appendix H illustrates, D4L made commendable progress against my theory of action during the timeframes of the strategic project. However, as Table 1 shows, my business-development-related work with D4L lagged that with The Teachers Guild by several months. This lag constituted sufficient time that my collaboration with the D4L business development team ran up against the endpoint of my strategic project. With a longer strategic project, more joint progress could have been made. This is a fruitful area for further exploration by D4L and IDEO, and would be particularly well suited for a future resident.

**Client-facing deliverables drove efforts aligned with my theory of action.** As the final PELP Coherence Framework connection in this analysis, the framework identifies “stakeholders” as enabling participants for instructional improvement programs. As previewed in the *Design of the Strategic Project*, I used external stakeholder engagement and externally-facing client deliverables to enhance the “authorizing environment” of the Guild and D4L, thereby

motivating the Guild's and D4L's "task environment" to more closely cohere and align with my theory of action (Moore & Khagram, 2004).

Prior *Evidence to Date* observed the Carnegie Corporation of New York's (2016) interest in advancing "greater collaboration, coherence... [and] integration" in the education sector's innovation efforts (p. 1). I capitalized on Carnegie's Integration Design Consortium as a well-aligned venue for me to advance the Guild's and D4L's activities in a manner coherent with my theory of action (per PELP). In particular, the pain points that Carnegie identified around disconnection, fragmentation, and attenuated social impact aligned closely with this capstone's desire to "increase the reach, lifetime, perseverance, and adoption of innovations in education." Carnegie's call for "dynamism across the U.S. education system" shared this capstone's appreciation for the promise that "creativity and innovation" offer our schools and our young people. At the same time, Carnegie's theory about the ameliorating potential of "integration," "collaboration," and "coherence" aligned closely with my theory of action to foster "relationships and structures that ease and accelerate organizational change" and design "explicit linkages between teachers, school leaders, and district colleagues" in creative, innovative activities. In short, the Integration Design Consortium provided space, established urgency, and marshaled resources coherent with my theory of action, expanding the "authorizing environment" that accelerated significantly this strategic project (as evidenced by Appendix E).

The composition of IDEO's team for the Integration Design Consortium was particularly central to advancing the strategic project. The team was



constructed purposefully to include colleagues from both D4L and The Teachers Guild, with an eye toward situating the resulting project deliverables in the Guild's future work. The team included a systems designer and a visual designer from D4L, an education researcher across the Guild and D4L (i.e., me), and content contributors and reviewers from both the Guild and D4L. With respect to Carnegie, this cross-group, cross-functional team elevated the quality of IDEO's work with the consortium by synthesizing IDEO's various expertise. With respect to this strategic project, this team composition advanced my theory of action by dedicating staff and resources to it, engaging a cross-section of IDEO colleagues in deep inquiry and discussion around it, and establishing it as shared vocabulary. The Integration Design Consortium, its analysis—and by extension, my theory of action—continue to shape and manifest in 2017 activities for the Guild and D4L. Coupling my theory of action to externally-facing client deliverables built and sustained momentum for this strategic project.

**Shared aspirations for positive social progress served as common ground to advance the strategic project.** The prior two sections of analysis might be (mis)construed to encourage an accountability-driven system akin to Race to the Top (RTTT) or No Child Left Behind (NCLB), driven by financial incentives, deadline- and deliverable-driven accountability, and public reporting. At this point, the reader might be reasonably suspicious and skeptical for at least two reasons. First, such an approach appears antithetical to IDEO's human-centered values and culture, as evidenced in their theory of action per Brown's (2009) and

Kelley's and Kelley's (2013) reverence of human-centeredness and emotional resonance. Second, the empirical effectiveness of RTTT and NCLB is mixed and contentious (Dragoset, et al., 2016; Howell, 2015; Rothstein, Jacobsen, & Wilder, 2006; Zavadsky, 2006).

Here, the key difference is the co-creation of shared aspirations—in Ganz's (2011) parlance, shared "stories of us"—that guided the work at hand. The Teachers Guild's, D4L's, and my shared aspiration of encouraging social progress provided common ground to learn about and from each other, build each other's capacity in our respective value priorities, advance our individual value priorities, and develop our shared priorities. Where RTTT and NCLB used financial incentives and externally-facing accountability in the context of top-down directives, my approach in this strategic project did so in the context of jointly crafted purpose. Ganz encourages developing such joint purpose through shared stories, and Appendices B, D, E, F, and G illustrate how Ganz's approach motivated this strategic project.

How were these shared stories synthesized? Comparing IDEO's and my theories of action, IDEO's theory of action prioritizes creativity and innovation, while mine focuses more on equity and reach. To be explicitly clear, this is *not* to suggest that IDEO rejected the value of socioeconomic inclusion and racial diversity in its work. Rather, this is an observation of relative priorities given limited time and attention in each day. Just as I initially gravitated toward considerations of equity and reach, IDEO initially gravitated toward considerations of creativity and innovation, while both of us shared an appreciation for and interest in each other's value priorities. IDEO's and my

theories of action—and our underlying value priorities—are not dichotomous trade-offs, but can be integrated in a complementary fashion.

The “north star” of encouraging positive social progress enabled IDEO and me to align and merge our efforts. This approach utilized Fisher’s, Ury’s, and Patton’s (1991) negotiation techniques to “focus on interests, not positions” (p. 40) in order to “invent options for mutual gain” (p. 56). With respect to my own values as an education leader, I am excited about the potential benefits that IDEO’s expertise can offer our schools and our young people. Increasing access to and capacity for education innovation for historically underserved communities—particularly communities of color and people with lower incomes—can help to reduce gaps in opportunities and outcomes that these communities experience. With respect to IDEO’s values as an organization, the Guild and D4L aspire to maximize the social progress encouraged by their work. While ninety percent of our young people are enrolled in public primary and secondary schools (National Center for Education Statistics, 2016a), and most of our students of color and students with lower incomes attend public primary and secondary schools (National Center for Education Statistics, 2016e), Appendices A and H illustrate that the majority of the Guild’s and D4L’s efforts do not yet engage public education organizations, whether as direct clients or through funding intermediaries. Therefore, increased attention to the socioeconomic and racial distribution of the communities engaged through the Guild’s and D4L’s work can also enhance social progress from IDEO’s expertise by connecting it with those schools serving the preponderance of our young people. As previously discussed in the financial considerations in this section,

while limited discretionary budgets for public education organizations may make it more difficult to engage them directly, D4L's historical strength working with foundations and nonprofits offers IDEO an opportune alternate pathway to public education organizations.

In summary, establishing the common ground of fostering social progress helped advance the strategic project. And, in advancing the strategic project, focusing attention on socioeconomic inclusion and racial diversity was mutually beneficial in relation to my individual, IDEO's organizational, and our shared value priorities.

### **Implications for Self**

Given the prior analysis, this strategic project suggests three implications for myself as a continually evolving education leader: one each related to leading with stories, humility, and where to locate behavioral change for adaptive journeys.

**Story-driven leadership is useful and effective in particular contexts, and can be learned, practiced, and refined.** This strategic project was designed to drive toward future evidence of success through the early entry point of stories. Given No Child Left Behind's accountability requirements, the education sector has focused for the past fifteen years on building capacity for data reporting and evidential analysis. However, the capacity for story-driven leadership has not been developed as systematically. This presents

leadership opportunities that respond to the calls of IDEO's human-centered theory of action and Ganz's public narrative framework.

In the fall of 2008, I started working at a nascent, New-York-City-based teacher training program called Teacher U. Beyond my day-to-day delivery responsibilities, one of my early leadership challenges was to facilitate the visioning of Teacher U's eventual instructional model. Norman Atkins, co-founder of Teacher U, asked me to steward these discussions with Mayme Hostetter and Brent Maddin, our co-directors of teaching and learning. Hostetter, Maddin, and I retreated for several days to loaned space in a middle school conference room to discuss and surface this vision. On my part, I facilitated the discussion through a bottom-up, deductive, detail-driven approach. We gathered line-item-level ideas and inventoried them in a detailed spreadsheet. From there, we tried to deduce and distill our aspirational instructional vision. The tone and tenor became analytical and serious. We found ourselves focused on capturing exhaustively all of the line items that seemed at the time necessary to describe each constituent instructional component.

Two weeks later, the momentum for our initiative fizzled out and we moved on to more pressing activities. My approach was not an abject failure, and we eventually inferred a shared, intuitive direction for our instructional vision that grew, refined, and evolved into Relay Graduate School of Education. However, this experience was a missed leadership opportunity to rally, inspire, and coalesce a nascent team around a compelling imagination of what we might realize together. My style, facilitation, and skill were not optimally matched with

the task and the context at hand. This was a divergent, imaginative, right-brained exploration to which I tried to apply linear, logical, left-brained analysis.

In contrast, in the summer of 2016, I joined The Teachers Guild team and the Design for Learning studio. As previously described and analyzed, I facilitated the articulation of the Guild's aspirational vision through stories, purposefully endeavoring to downplay line-item-detail discussions until the overarching narrative was established. The tone and tenor were light, playful, and energizing. We established a set of shared aspirational stories in a few weeks' time that then became a nucleus around which supporting details were built.

I am encouraged and invigorated by these recent successes with story-driven leadership. In the spirit of Dweck's (2007) growth mindset, I am also excited about the malleability of story-driven skills and the potential for my continued use of story-driven approaches—when contextually appropriate—in my future education leadership.

**Servant leadership is a powerfully disarming way to engage teams.**

As Greenleaf (1970) articulates:

"The servant-leader *is* servant first... It begins with the natural feeling that one wants to serve, to serve *first*... That person is sharply different from one who is *leader* first... For such it will be a later choice to serve—after leadership is established." (p. 6, emphasis in original)

More venerably, Lao-Tzu (1988) philosophized in the fifth century B.C.E.:

“When the Master [leader] governs, the people are hardly aware that he exists... The Master [leader] doesn’t talk, he acts. When his work is done, the people say: ‘Amazing: we did it, all by ourselves!’” (p. 17)

I take these leadership visions to heart and care deeply about engaging with others humbly, with a “can do” attitude, and with an eye toward shared success.

Fortunately, in my leadership experience, I have found this approach not only philosophically satisfying, but more importantly *effective*. Downplaying positional prestige and engaging with colleagues with a genuine focus on their needs and pain points has gone a long way to building relationships and accelerating work. In the context of this capstone and as reviewed in the *RKA*, such an approach also directly reinforces IDEO’s (2013) organizational values to “take ownership” in order to “help others be successful.”

One of my ongoing managers and mentors once characterized me as a “high caring, low drama manager.” I consider that a high compliment. My colleagues at IDEO affirm that assessment, its value, and its effectiveness in the context of this strategic project (A. Engström & S. Madsen, personal communication, September 15, 2016; A. Diefenthaler, personal communication, September 30, 2016; P. Nikolic, personal communication, December 9, 2016; B. Brownell & E. Scripps, personal communication, December 13, 2016; M. McMahon, personal communication, December 20, 2016). With that in mind, I look forward to continuing an attitude of servant leadership in my future education leadership.

**It is easier to help others act into a new way of thinking, rather than think into a new way of acting.**<sup>20</sup> When addressing an adaptive gap, a new way forward need not—and likely cannot realistically—be fashioned completely out of whole cloth. Rather, as reviewed in the *RKA*, Heifetz (1994) recognizes the adaptive journey as an “iterative process” that toggles between “interventions” and reflections (p. 32). IDEO’s theory of action similarly appreciates the importance of “help[ing] clients envision... the future” and “build[ing] road maps for getting there” (Kelley & Kelley, 2013, pp. 24-26); that is, making known the current actions that may help one achieve a future state that is yet unknown.

I have observed from this strategic project and from my broader doctoral studies that it can be more accessible for those on an adaptive journey to get into the regular *practice* of their future, desired, adaptive state and allow the supporting conceptual *belief* to solidify over time, supported by early successes. This is in contrast to justifying firmly to oneself a future, desired, adaptive conceptual belief before allowing oneself to engage in the associated practices. With this considered, structures that encourage and hold those on adaptive journeys accountable to *practicing* their desired, future state (simultaneously confronting the belief gaps between their current and future states) can help scaffold adaptive journeys.

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<sup>20</sup> While this aphorism is used casually, it is also reflected in the scholarly literature. For example, in the context of literature reviewed in this capstone, Pascale, Sternin, and Sternin (2010, p. 38) and Pascale, Milleman, and Gioja (2000, p. 14) affirm this analytical observation and use nearly identical language.



Such an approach is supported both by practice and literature. In practice, as analyzed in the prior section, the above approach advanced IDEO along its own adaptive journey relative to my theory of action. While this adaptive journey is certainly not complete, the *Analysis of the Strategic Project* describes and recognizes the positive progress made over the past year. I also observed the effectiveness of the above approach in my own leadership coaching through my doctoral studies using “immunity to change” concepts and protocols (Kegan & Lahey, 2009). In the literature, the above approach is a central feature of the “positive deviance” philosophy, used to address adaptive challenges particularly in the public health sector (Pascale et al., 2010).

### **Implications for Site**

In the past five years, IDEO has positioned itself in the national education landscape through *Design Thinking for Educators*, the Design for Learning studio, and The Teachers Guild. Commendably, through its experience to date working with a relatively small subset of the education sector, IDEO now shapes the national education discourse, particularly with respect to innovation, creativity, and design. This strategic project suggests three implications that may help IDEO realize its aspiration of maximizing positive social progress through its education design work: increased engagement of public education agencies, increased engagement of more diverse clients across the education sector, and continued demonstration of impact evidence.

### **How might IDEO increase its engagement of public education agencies?**

As previously discussed, The Teachers Guild's and D4L's "stories of us" parlay their experience and expertise into greater social progress with their education clients. Given that more than ninety percent of U.S. students attend public PK-12 schools (National Center for Education Statistics, 2016a) and more than eighty percent attend public colleges and universities (O'Shaughnessy, 2011), maximizing social progress in the United States will require IDEO to engage a wider range of public education agencies.

Having considered in the *Analysis of the Strategic Project* the sector-level challenges and IDEO's organizational opportunities associated with direct engagement of public education agencies, the Guild and D4L may increase their engagement of public education agencies in four complementary ways:

1. Connect The Teachers Guild and the Design for Learning studio with those *large public school districts* that enroll sizable populations of our young people (typically large urban districts);
2. Engage *rural public school districts*, which the Guild may be better positioned than solely in-person programs to reach given its technologically-enabled program design, and which have historically been underserved;
3. Explore and seek opportunities for D4L to complement its PK-12 project portfolio with engagement of *public colleges and universities*; and
4. Capitalize on D4L's current strength working with *foundations and nonprofits* to advocate and shape the direction of these organizations'

work toward public education agencies, as described in the prior three recommendations.

**How might The Teachers Guild and the Design for Learning studio regularly report and learn from demonstrable evidence of impact?** Through this strategic project, The Teachers Guild and D4L made demonstrable progress developing and implementing systems of institutional assessment. Going forward, the Guild and D4L have opportunities to use measurement systems to:

- Internally, keep their efforts aligned with their aspirational visions; and
- Externally, complement their traditional, story-centered impact reports with substantiating evidential data.

Finally, The Teachers Guild and D4L should build regularly scheduled habits of publicly sharing the latest results from their metric systems. As was discussed in the *Design of the Strategic Project*, such routines design accountability—internally to IDEO’s teams and externally to its clients and colleagues—for The Teachers Guild and D4L to make continued progress along their adaptive journeys toward their aspirational visions. These routines are “stakeholder”-oriented “systems” (i.e., two aligned elements of the PELP Coherence Framework) and are reflected in Heifetz’s (1994), Kotter’s (1995), and Pascale et al.’s (2000) perspectives from the *RKA*.

Such regularly scheduled opportunities to synthesize and share quantitative (i.e., metric-system-based) and qualitative (i.e., case study, story-based) evidence might include:

- Connections to client work;<sup>21</sup>
- External thought leadership, shared through articles (e.g., published in digital and print media, in both scholarly and popular venues), speeches and conferences (e.g., AERA, iNACOL, SXSWedu), and prototypes;
- Forward-looking annual planning for the Design for Learning studio as part of IDEO's annual organizational planning; and
- Retrospective, periodic reports (e.g., annual or quarterly impact reports) for internal audiences (e.g., financial or staffing reports) and external audiences (e.g., clients and funders).

Through regular use and refinement of the Guild's new program evaluation system (i.e., Appendix F), and by complementing D4L's business development stories with similar assessment systems (i.e., Appendix H), IDEO can encourage well-aligned progress toward its aspirations in the education sector.

**How might The Teachers Guild and the Design for Learning studio engage a diverse range of clients that is more representative of the broader education sector?** Related to the prior recommendation, The Teachers Guild and

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<sup>21</sup> Design for Learning is demonstrating early progress in this area. For example, in February 2017, D4L engaged with a national foundation and the Hasso Plattner Institute of Design at Stanford University to develop an assessment system and associated metrics for "deeper learning" as articulated by Fine & Mehta (2014). Such assessment approaches and metrics may be applied back to D4L's and the Guild's professional practice.

D4L may also use their emerging assessment systems to scaffold their adaptive journeys in engaging a more diverse, representative range of education clients in the service of encouraging positive social progress.

As discussed in the *Analysis of the Strategic Project* section and substantiated by Appendices A and H and the RKA, The Teachers Guild and D4L currently work with relatively low percentages of public educators when compared to the enrollment distribution of U.S. youth among public and private schools. As reflected in the data-driven, cross-role aspects of my theory of action, continued attention to more diverse representation across IDEO's education clients—both in types of schools as well as racial and socioeconomic distributions—will support IDEO's aspirations of maximizing social progress through its education work.

**How might The Teachers Guild and D4L take greater advantage of the wisdom in the Design for Change studio?** As discussed in the *Analysis of the Strategic Project*, the Guild enhanced its efficacy by integrating change management considerations into its program design. As a broader organization, IDEO is developing greater capacity in change management by growing and strengthening its Design for Change studio. While D4L has had early collaboration with D4C, such D4L-D4C collaboration is not yet regular or habitual (A. Diefenthaler, personal communication, March 2, 2017). This suggests an opportunity to enhance the Guild's and D4L's efficacy by integrating D4C's insights more regularly into the Guild's and D4L's future work.

## Implications for Sector

So far, this capstone has considered the essential question of encouraging the activity and sustenance of educator-driven innovation in the specific contexts of IDEO and my personal leadership development. Stepping back, there are also instructive implications for the larger education sector, particularly in relation to this capstone's theories of action. For the sector at large, educators may benefit from refocusing our policy attention toward relationships, building change management techniques into education innovations, designing more purposeful connections across educator roles and schools, and boosting education leaders' capacity to use stories as part of their leadership repertoire.

**How might we design more for relationships and connection, and less for systems and content?** For me, one unexpected through-line emerged from various aspects of the strategic project: the opportunity for education leaders to focus more purposeful attention on fostering, growing, and enriching relationships and connection among fellow educators. From coaching educators' imagination with The Teachers Guild, to field research for Carnegie's Integration Design Consortium, to business development for the Design for Learning studio, we heard repeatedly about the isolation that teachers experience in their daily craft; lived experience that reinforces Cuban's (2013) and Hess's (2015b) observations in the *RKA*. While teachers are encouraged and expected to be human-centered, empathic, and relationship-focused with their students, at the same time they are not encouraged to pursue the same kinds of connection with their professional colleagues.

It is well documented that most of our recent, prominent education policy initiatives have focused on content (e.g., Common Core State Standards) and systems (e.g., No Child Left Behind). This focus has become so normalized in the education sector that our most recent policy hallmark is another system-driven initiative: the Every Student Succeeds Act (ESSA). This focus on content and systems becomes surprising, however, when juxtaposed against the relational disconnects expressed by educators whom IDEO interviewed and engaged during the strategic project. Teachers are hungry for meaningful connections with fellow adults; for supportive, engaging, trusting human relationships with fellow colleagues. But, our current policy environment focuses on those areas of our educational endeavor that have less of a human touch (IDEO & The Teachers Guild, 2016).

With all of this considered, the strategic project offers a simple but provocative reframe for the sector: How might teachers be supported, developed, energized, and restored by helping them grow and maintain healthy, vibrant, human relationships with fellow educators? And, similarly reframing this capstone's essential question: What if we encouraged our educator-driven innovations to lead with relationships and connection (IDEO & The Teachers Guild, 2016)? This could be a fruitful area for further research in the sector.

**How might we build change management techniques into education innovations?** As Vranek et al. (2015), Fullan (2001), Bryk et al. (1998), and Fullan and Quinn (2016) observe—and as this strategic project's experience reinforced—innovation holds attractive potential, but its lasting value is realized through full,

consistent implementation, with coherent integration into local contexts. Thoughtful “follow-through” (Vranek et al., 2015, p. 1) facilitates the kind of full, consistent implementation that enables education organizations to access enhanced performance beyond initial “implementation dips” (Fullan, 2001, p. 40). Coherent integration into local contexts helps innovations become central parts of education organizations’ DNA (Heifetz et al., 2009, p. 16), rather than peripheral decorations that may be aesthetically appealing but practically ineffectual (Bryk et al., 1998, p. 123). This capstone and its strategic project demonstrated that education leaders may take advantage of concrete, feasible practices—such as those of Kotter (1995), Kanter (1983), and Fisher et al. (1991)—to reduce barriers to, accelerate adoption of, and enhance the permanence of innovation-oriented change. Designing these change management techniques into education leaders’ innovation practices bridges the transition from design to implementation, supports this capstone’s essential question, and offers value for the sector.

**How might we design more explicit linkages across educator roles (e.g., teachers, school leaders, district colleagues) and within and between schools?** As a specific example supporting the prior implication, the case studies in the *Analysis of the Strategic Project* illustrate that the sustenance and reach of teacher-driven innovations can be attenuated when fellow educators are not engaged early in the creative process. Other prominent players in the education sector—for example, foundations like the Carnegie Corporation of New York—similarly lament the “fragmented and siloed” outcomes from education policies



and innovations that engage individual segments of educators in isolation. Earlier discussion in this capstone offered some early encouragement about designing teacher-driven innovations toward “integration” and away from “fragmentation” (Carnegie Corporation of New York, 2016, p. 1). With this considered, there are significant opportunities for the broader education sector to improve the sustenance and reach of educator-driven innovations by designing such efforts to engage educator teams—throughout the creative process—across some combination of typical system boundaries:

- Traditional educator roles (e.g., teachers, school leaders, district colleagues);
- Classrooms, grade levels, and/or subject areas within a school; and
- Multiple schools in a district or across districts.

Such opportunities would extend the explorations of cross-role integration proposed in my theory of action.

**How might we bolster growing education leaders’ capacity to lead with stories?** Examining empirical experience, developing education leaders grow into their leadership roles by building depth in a combination of instruction, curriculum, operations, and business. The experience and analysis of this strategic project suggests that as education leaders gain increasing facility managing, organizing, and synthesizing a broader topical scope, stories may be used more often as engaging, relatable, human-centered points of connection. Particularly as education leaders progress into more senior roles with expectations to offer vision and inspiration, it is fortunate and encouraging to

understand that story-driven skills are malleable. As education is one of our most human-centered professions, educators already have the philosophical orientation and the socioemotional capacity to lead with stories; a simple matter of practice and focus can help develop further these skills across the sector.

Looking forward, Ganz (2011) encourages us that nurturing such story-driven leadership capacity is possible, valuable, and may advance further the prior recommendation to design for supportive, engaging, trusting relationships among educators.

“We can counter feelings of *isolation* with the experience of *belovedness* or *solidarity*. This is the role of mass meetings, singing, common dress, and shared language [i.e., stories]. This is why developing relationships with the people whom we hope to mobilize is important.” (p. 279, emphasis in original)

## Conclusion

To recap, this capstone considered the question: *How might we encourage educators’ ideas and innovative approaches, and support the survival, sustenance, and growth of those ideas and innovations?* IDEO’s theory of action prioritized a human-centered approach to foster innovations that work well, feel good, and describe an explicit path to a compelling future. My theory of action hypothesized that coupling IDEO’s creative strengths with more explicit attention to how educators work together and broader representation of educators would help advance the survival, sustenance, and growth of education innovations.

This strategic project demonstrated initial, positive progress along both IDEO’s and my theories of action. In particular, it appears that bolstering

educators' sense of self-efficacy helps encourage educators' ideas and innovative approaches. Designing explicitly for cross-role linkages—among educators, and across typical system boundaries—appears to enhance the survival, sustenance, and growth of education innovations. And, attending explicitly to socioeconomic inclusion and racial diversity in IDEO's future work can enhance the positive social progress from education innovations while improving equity and access to opportunity.

The PELP Coherence Framework suggested “culture,” “structure,” “resources,” “stakeholders,” and “strategy” as key elements that should shape this strategic project in a manner aligned with my theory of action. Looking internally, culture and structure were innovation accelerants as they facilitated frequent connection, trusting relationships, generosity of spirit, and a sense of possibility among The Teachers Guild, the Design for Learning studio, and me. Looking externally, financial resources and stakeholder urgency, accountability, and visibility helped sustain the strategic project's tempo. My strategy for this strategic project capitalized on resource needs to establish stakeholder accountability—in the context of IDEO's culture and structure—to bring the Guild's and D4L's activities into closer coherence and alignment with my theory of action.

As encouraged by Ganz's public narrative framework, The Teachers Guild, D4L, and I forged IDEO's and my theories of action (“stories of self”) into shared aspirations (“stories of us”) that propelled efforts in the strategic project (“stories of now”). Such shared aspirations also advanced the Guild's, D4L's, and

my shared work beyond the pragmatic considerations of the PELP Coherence Framework, enriching our relationships with empathy and mutual curiosity.

IDEO's and my experience in this strategic project validate the utility and trainability for educators of story-driven leadership. Shared story-crafting and story-telling may help develop and deepen relationships between educators; sustain adaptive work by establishing mutual purpose; and offer lighter points of entry to future, more rigorous, evidential assessment.

Our experience also suggests that organizations and education leaders aspiring to maximize their positive social impact—where their conception of impact centers on equity, reach, and/or replicability—must be purposefully and regularly attentive to socioeconomic inclusion and racial diversity. Slow or stalled progress on either dimension can signal an adaptive gap for the organization or the education leader. Such adaptive journeys may be facilitated and accelerated by structuring the work to “act into a new way of thinking,” and by using externally-facing visibility, resources, and milestones to sustain the tempo of the work.

For IDEO, it is too early to judge their success increasing the reach, lifetime, perseverance, and adoption of innovations in education. The *Analysis of the Strategic Project* illustrated promising forward progress, though clearly more work remains to be done. Looking forward, the Guild and D4L may accelerate their aspired “disproportionate impact through design” by pursuing new approaches, structures, and relationships that enable work with those public education agencies enrolling a larger, representative segment of U.S. students. As two illustrative examples, D4L's existing portfolio of foundation and

nonprofit work may facilitate future opportunities with public education organizations, and cohort-based project models (as opposed to individual-client-based project models) may make the economics of such work more feasible.

For the U.S. education sector, this strategic project suggests future opportunities to develop more, deeper relationships among educators. Specifically, how might we design for more collaborative, generative educator relationships across typical system boundaries? How might we use stories to kick off, enrich trust, and build investment in these cross-role relationships to invigorate educators in creating novel, relevant solutions for our students and our schools? And, how might these cross-role relationships enable the trust, know-how, and collaboration that enhances the survival, sustenance, and growth of education innovations? Funders, public education agencies, private schools, and non-profit and for-profit education organizations can continue exploring these opportunities as they have historically. In addition to these actors, teacher unions and principal unions could play exciting roles in these areas given their local and national presence, their focus on professional development and growth, and their ability to influence the shape of teachers' and principals' occupational expectations and responsibilities.

Pursuing such opportunities—both at IDEO and in the sector more broadly—could not only help advance and sustain improvements to the “instructional core” for our young people’s benefit, but also honor the human needs and embrace more holistic contributions of our educators who work selflessly on their behalf.

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## **Appendix A: Historical Data for The Teachers Guild**

The following artifacts illustrate the financial data and user engagement data tracked by The Teachers Guild before the start of this capstone's strategic project (as of June 6, 2016). Note that some confidential financial data are redacted.



	A	B	C	D	E	F	G
1	<b>GUILD Program (31397)</b>	Actual Cost Accrued	Amount Budgeted through 12/31/16	% Burned	Remaining Cost through 12/31/16	Amount Remaining	Est Burn % YTD
2	Core Team (Guild)	\$	\$	%	\$	\$	%
3	Extended Team (nonGuild)	\$	\$	%	\$	\$	%
4	Expenses	\$	\$	%		\$	%
5	<b>Total</b>	\$	\$	%		\$	
6							
7							
8							
9	week count		1	2	3	4	5
10	% complete						
11	week	total					
12	guild team labor cost						
13	non-guild labor cost						
14	non-guild labor cost at margin						
15	total labor						
16	<b>labor cost accrued</b>						
17							
18							
19	Contingency Adjustments:						
20	\$	starting amount					
21	\$	revised amount (12/17/15)					
22	\$	revised amount (2/12/16)					
23							

[illegible]

[illegible]

## **Appendix B: Forward-Looking Impact Model for The Teachers Guild**

The following impact model codified The Teachers Guild's shared aspirations—as of August 15, 2016—for its future work.

# Impact model



## SOCIAL PROBLEM

What pain points do we seek to address?

Although teachers shape their classrooms, **education reforms are often imposed** on them rather than designed and led by them, creating a system that isolates teachers and is disconnected from students' evolving needs.



## MISSION

What do we strive to accomplish?

The Teachers Guild is a member-led community where **teachers create systemic change** for and from their classrooms.



## STRATEGY

What is the experience we offer teachers to accomplish our mission?

**Do** design thinking and build creative capacity

**Learn** in a creative collaborative

**Lead** locally to catalyze creativity nationally



## OUTCOMES

How will we know we have helped change teachers and the system?

More teachers honored as **creative leaders**

**Better solutions** for students and schools

System adopts and **welcomes teacher innovations**



## IMPACT

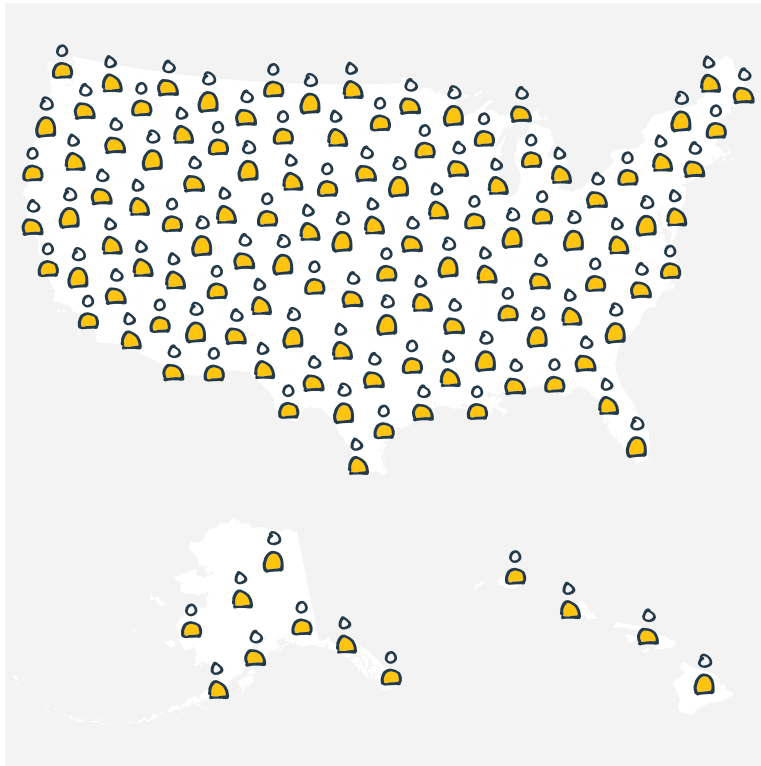
How will we continue to impact education in the future?

By consistently innovating for students' evolving needs, teachers **reshape their profession** into a creative force for our schools and communities.

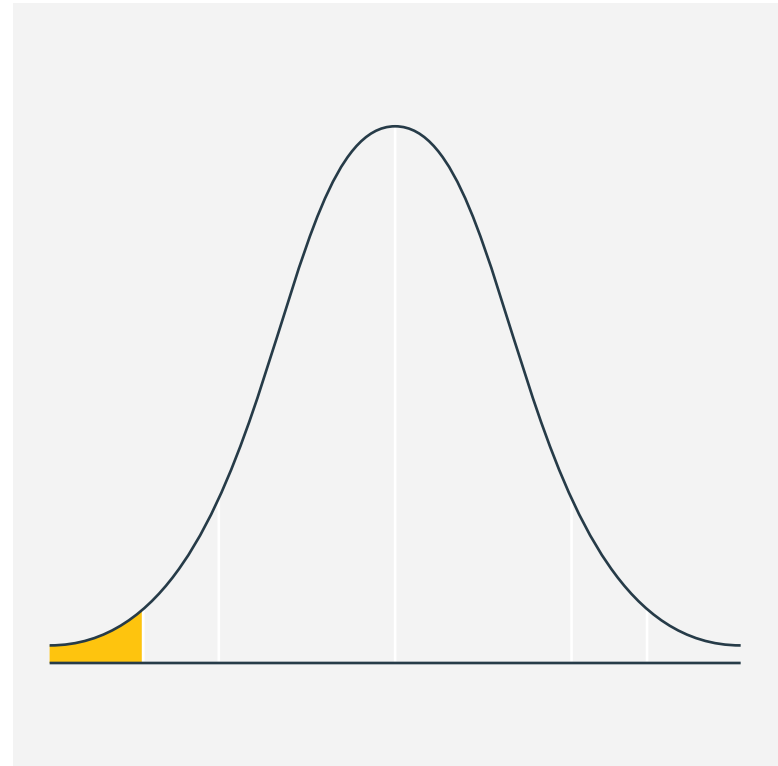
The Teachers Guild aspires to mobilize all of our nation's teacher-innovators, **sparking better solutions** in service of our diverse students' evolving needs.

## **The Guild will mobilize 90,000 teacher-innovators in 5 years**

OUT OF 3.5 MILLION ELEMENTARY AND SECONDARY U.S. TEACHERS...

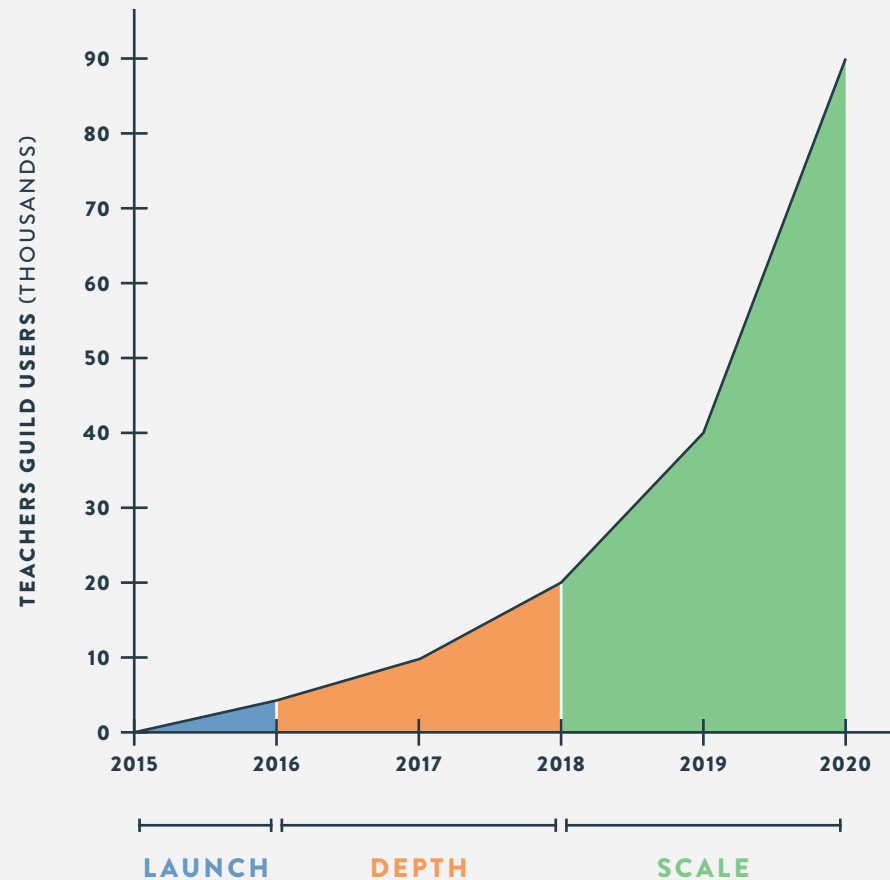


...ROUGHLY 90,000 ARE TEACHER-INNOVATORS



## **Depth** **through** **2018,** **scale in** **2019-2020**

The Guild will build on experience from its **launch** year, **deepening** engagement with teachers, then **scaling** its reach across teacher-innovators.





## **Appendix C: *Pro Forma* Financial Analysis for The Teachers Guild**

The following financial analysis quantified—as of September 9, 2016—the resources expected to deliver against the impact model provided in Appendix B.

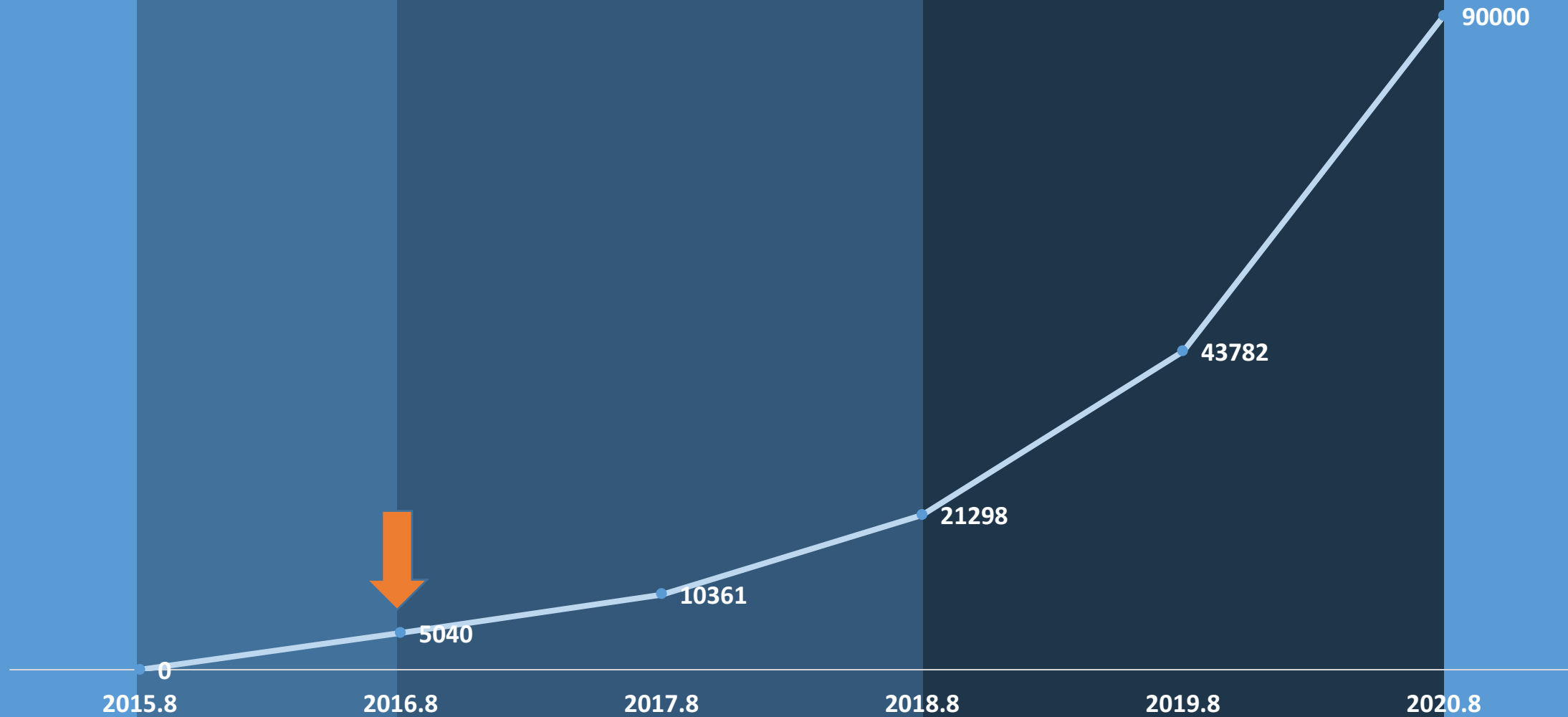
# Questions

- Does the total fundraising amount seem feasible?
- Do the increases in staff and expense feel right?
- Does the new team structure look right?

LAUNCH

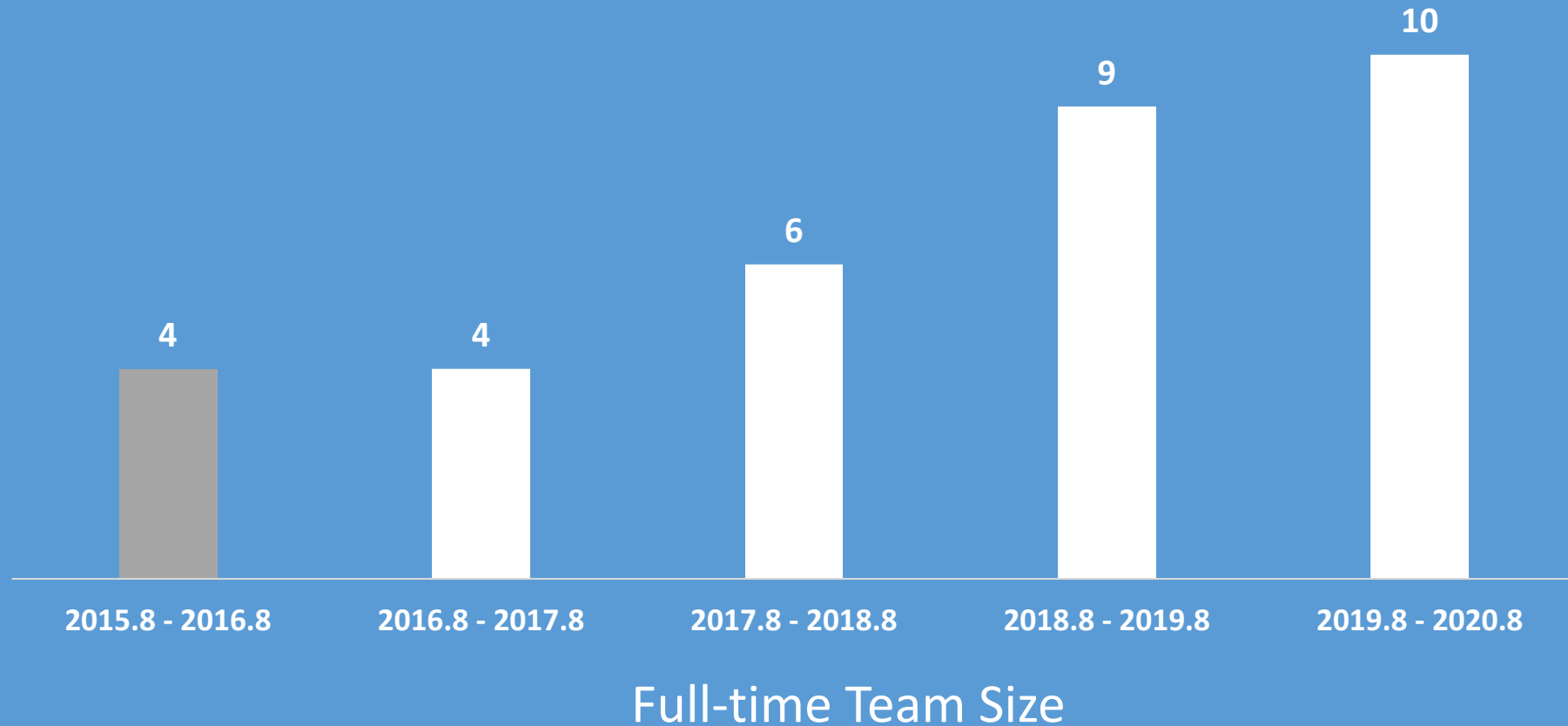
DEPTH (Organic Growth)

SCALE (Active Marketing)



**\$7M** Mid 2016 (Now) – Mid 2020

OR **\$1.75M** /year



NOW: \$1.1M /year

which means +\$0.6M /year on average

## NEW INVESTMENT AREAS

- Content production
- Community management
- Digital marketing
- Partnership management
- Platform management

## **Appendix D: Fundraising Pitch Book for The Teachers Guild**

The following document—produced in late September 2016—facilitated fundraising events and discussions for The Teachers Guild.



*the*  
**TEACHERS  
GUILD**

[www.teachersguild.org](http://www.teachersguild.org)

We are  
**The Teachers Guild.**  
Nice to meet you.





**“There is this shared belief among educators today that the status quo is not okay. And that we are actually in the position to do something about it.”**

— **ANU OZA**, 7TH GRADE ENGLISH TEACHER,  
SAN FRANCISCO, CA



## **Maybe you've noticed...**

Although teachers have freedom to shape the details in their classrooms, many feel that education reform is often imposed on them rather than designed and lead by them. This creates a system that isolates teachers and is disconnected from students' evolving needs.

### **WE BELIEVE**

**Teachers are the innovators education has been waiting for,** and that every teacher has an inner designer capable of creating better solutions for our students and schools.

Our teachers are  
redesigning their  
profession into a  
**creative force** for  
our students, schools,  
and communities.

The Teachers Guild is a member-led community that offers:



### AN ONLINE PLATFORM

Where educators collaborate and create beyond school walls.



### COACHING & MENTORSHIP PROGRAMS

Developing teachers' creative capacity.



### LOCAL OFFLINE EVENTS

Where educators expand their creative leadership.



### A PARTNER NETWORK

Helping bring teacher-designed solutions to life.



### A TOOLKIT FOR EDUCATORS

Where teachers learn creative problem solving methods and mindsets.

“This project made me realize I was part of the solution.”

— KRISTIAN OWENS, HIGH SCHOOL COUNSELOR,  
WASHINGTON, DC



Kristian's Mock College Application App, designed to quickly introduce high schoolers to the college application process, was selected as a favorite solution in the To And Through College collaboration, in partnership with First Lady Michelle Obama's College Readiness initiative. She is currently using her idea to better prepare her students and increase their confidence during the college application process.



Implementing Partner:  
**Reach Higher**



With The Teachers Guild, teachers are **creating systemic change** for and from their classrooms by:



Teachers Guild community members at the White House Beating the Odds Summit in July 2016.

---

**DESIGNING**  
solutions  
to improve  
schools

Teachers join design challenges called “collaborations”, contributing innovative solutions for classrooms while strengthening their creative capacity.

---

**LEARNING**  
in a creative  
collaborative

Coaches guide teachers through the design process and run in-person events, while partners and industry mentors support them and help bring their solutions to life.

---

**LEADING**  
locally and  
nationally

Teachers become creative leaders in their communities by sharing ideas, promoting teacher-designed solutions, and inviting their fellow teachers to transform their schools.

---

Teachers are  
designing  
**solutions** for  
education's  
most pressing  
issues:

COLLABORATION 1

**A CULTURE OF INNOVATION**

COLLABORATION 2

**STUDENT CURIOSITY**

COLLABORATION 3

**TEACHER PROFESSIONAL LEARNING**

COLLABORATION 4

**TO AND THROUGH COLLEGE**

COLLABORATION 5

**STUDENTS AS MAKERS**

COLLABORATION 6

**PARENT-TEACHER CONFERENCES**

COLLABORATION 7

**CHARACTER BUILDING**

COLLABORATION 8

**STEM**

COLLABORATION 9

**CIVIC ENGAGEMENT**

“The Guild  
is a community  
that supports  
and nourishes  
innovative  
ideas that I can  
take back to  
my school.”

— WILL CAVADA, 6TH GRADE ENGLISH LANGUAGE ARTS  
TEACHER, SAN JOSE, CA



Will's Spoken Journey Slam, developed during the Parent-Teacher Conference collaboration, is a creative curriculum for student-led parent teacher conferences. To spark conversation, students present their learning journey to parents using spoken word. It is currently being piloted in several Royal Society of Arts (RSA) schools in the UK.



Implementing Partner:  
Royal Society of Arts

We will know our  
community is  
**driving systemic  
change** when:

More teachers are honored as **creative leaders**

---

There are **better solutions** for our students  
and schools

---

Our education system adopts and **welcomes  
innovative teacher solutions**

---



Teachers  
prototyping  
ideas during  
the Culture  
of Innovation  
collaboration  
at the Stanford  
K-12 Lab.





**“I’m part of The Guild because I want teachers to have a voice in creating change.”**

— CHARLIE SHYROCK

## Meet **Charlie Shyrock**

Charlie is an English teacher from Maryland with 15 years of experience. During the Culture of Innovation collaboration, Charlie shared his idea “The Sub Hack” with his peers in The Teachers Guild. His idea is an easy to implement program for substitute teachers to facilitate student-led ‘passion projects’ when a teacher is absent.

Charlie’s Teachers Guild peers, as well as his students, helped to prototype his idea, and a mentor at Google for Education helped to build an implementation plan.

Charlie discovered there was a much bigger world outside his classroom. He now leads workshops as a Teachers Guild coach, and inspires other teachers in his school and community to design better solutions together.

### THE SPREAD OF CHARLIE’S IDEA



We launched in late 2015, and in **our first year:**



**+5,000**

Teachers across all 50 states became members, embracing their potential as designers of change



**27%**

Average monthly membership growth reaching even more communities



**+1,200**

Ideas and insights for classroom solutions were posted by teachers



**+100,000**

Educator Toolkits were downloaded, inspiring creativity and making design methods accessible

**“Working with The Guild has helped us strategically activate human centered solutions in our District! The Guild has helped us create a process to elevate teacher ideas in our District.”**

— **SKYLER ROSSACCI**, SPECIAL INITIATIVES LEAD,  
SPRING BRANCH INDEPENDENT SCHOOL DISTRICT,  
HOUSTON, TX



Skyler and the Spring Branch Independent School District first partnered with The Teachers Guild with the goal of bringing active STEM solutions to their district. Spring Branch now hosts design thinking meet-ups in their community to inspire innovative thinking among their teachers. They are looking forward to piloting the solutions that emerge from the STEM collaboration in their schools.



Implementing Partner:  
**Spring Branch Independent School District**

We collaborate  
with a diverse group  
of partners who  
are committed to  
mentoring teachers  
and bringing their  
solutions to life.

## SCHOOL INNOVATORS



## INDUSTRY BUILDERS



## EDUCATION LEADERS





“Everybody asks our students to be career ready, but until I talked to engineers at Facebook, I didn’t know what that was.”

— DANNY SCUDERI, 6TH GRADE SOCIAL STUDIES TEACHER,  
SAN FRANCISCO, CA



Danny’s idea “Survival Week”, developed during the To And Through College collaboration, is a game that students can play to prepare themselves for the realities of college life. It was prototyped by students and engineers at Facebook’s Hackathon. Danny has continued to workshop the game and regularly joins Guild collaborations to share new ideas and support his peers.

facebook

Implementing Partner:  
Facebook

Our online platform  
set a new  
standard for design  
in education.



## WEBBY AWARD

The leading international award honoring excellence on the Internet

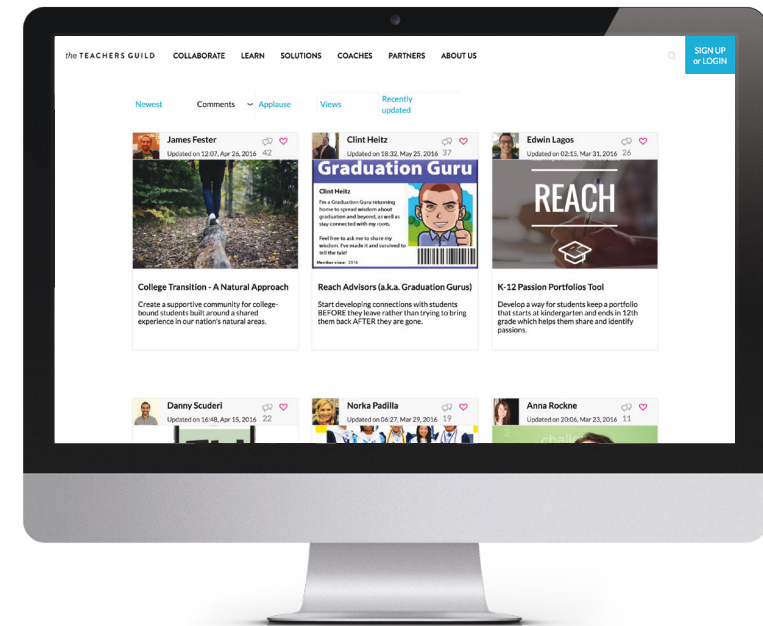
**Winner, Associations Category**



## CORE 77 AWARD

Recognizing excellence in all areas of design enterprise

**Winner, Design Education Initiative Category**



“Being a coach means  
I get to work with  
amazing educators  
who bring innovation  
to their craft...and see  
opportunities where  
others see problems.”

— MICHAEL SCHURR, 3RD GRADE TEACHER,  
TEACHERS GUILD COACH, NEW YORK, NY



As a Teachers Guild coach, Michael helps our teachers develop their creative capacity through design thinking during the online collaborations. He also hosts local brainstorming and prototyping events for his school and teacher community in New York.

# What's next for The Teachers Guild?

## HOW MIGHT WE...

**Design personalized programs that inspire creative leadership?**

We will broaden our support resources through in-person collaboration experiences, professional development workshops, certifications, and a coaching program.

**Drive the spread and adoption of teacher innovations?**

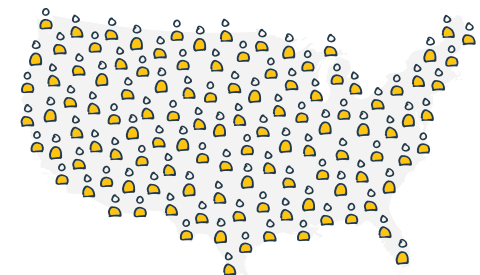
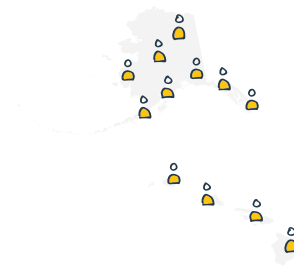
We will encourage the implementation of teacher-generated ideas through grant programs, pilot guidance, an idea exchange, and a portfolio of teacher solutions.

**Catalyze authentic collaboration across all levels of the education system?**

We will deepen our relationships with school districts, communities of color, and other education leaders to ensure teacher-generated solutions are adopted and every teacher has an equal opportunity to have their voice heard.

**Strengthen our creative collaborative to imagine high quality learning experiences for all learners?**

We will reach 90,000 teachers by 2020, focusing directly on connecting with diverse schools and communities, so that more teachers and their students have the opportunity to flex their creativity muscle.





# Be a part of **our future.**



Partners  
at Google  
designing  
with teachers  
during the  
Culture of  
Innovation  
collaboration.

## FOUNDER

Invest in the long-term future of The Teachers Guild to ensure we continue to support teachers on their path toward creative leadership. Founders will advise on the strategic growth and direction of The Guild and will have the opportunity to join Riverdale Country School and IDEO for creative leadership tours at the front lines of education design.

---

## COLLABORATOR

Sponsor a collaboration and inspire our teacher innovators to design solutions for an education question that matters deeply to you. Collaborators have the unique opportunity to influence the conversation by selecting the theme and inviting their network to participate.

---

## CONNECTOR

Fund our online and offline communities to help us reach even more creative leaders across the country. Connectors will have the chance to design and co-host workshops, special events, and fundraisers, helping us deepen our impact in coming years.

---

**“The Guild is a wealth of information from stories to ideas! It reinforces for me that education needs to be a collaborative partnership.”**

— **ANDRE DOUGLAS**, COLLEGE ADVISOR,  
COLLEGE ADVISING CORE, LANCASTER, PA



Andre's innovative app Mentor connects college students to a network of mentors, keeping them accountable and on track to graduate. His idea is currently being developed by Salesforce.org.



Implementing Partner:  
**Salesforce**

**TEACHERSGUILD.ORG**

The Teachers Guild is an initiative of PLUSSED, a registered 501c3 at Riverdale Country School, and the design firm IDEO.

## **Appendix E: Excerpt of Carnegie Integration Design Consortium Report**

The following document—produced in September 2016—is an executive summary excerpted from D4L’s and the Guild’s final report for the Integration Design Consortium convened by Carnegie Corporation of New York.

# Supporting teachers as innovators and setting their ideas up for successful integration across schools and systems

## Challenge

In July 2016, the Carnegie Corporation of New York assembled the Integration Design Consortium—a group of consultants and thinkers in the education sector, to engage with the following challenge:

## How can we encourage better integration across the U.S. education system?

From the Carnegie Corporation's vantage point looking across approaches and the sector, it's clear that although there have been significant investments in a wide variety of solutions to create change in education, the results have not been as impactful as hoped. The goal for the Integration Design Consortium is to drive toward solutions that link the efforts of teachers, principals, and district leaders, which will lead to remarkable education experiences.

## IDEO + The Teachers Guild

The topics explored with the Consortium are deeply connected to IDEO's education work: IDEO is a global design company that seeks to create positive impact through design. Last year, IDEO's Design for Learning studio launched The Teachers Guild, a member-led community where teachers innovate for and from their classroom. It explores how teacher-created ideas lead to systemic change in education.

The perspective that IDEO adds to this conversation therefore starts from a teacher-centered point of view.

## Approach

Through interviews with education practitioners and members of The Teachers Guild, a review of relevant research, and analogous research outside of education, the IDEO team gathered a wide range of perspectives. Based on the synthesis of the learnings, three areas of opportunity emerged that help identify what action steps might help amplify and sustain teacher-driven innovation, and ultimately lead to change in the sector.



IDEO



## GENERATE

THREE BIG QUESTIONS WE EXPLORED

### HOW DO IDEAS FORM IN EDUCATION?

Innovation is often perceived as radical new solutions. But in education, the majority of successful innovation happens through creatively adapting what works to new contexts. Educators often focus on customizing an idea, proven to work in another classroom, to the needs of their own students. As LaChé, elementary school teacher in Columbia, SC, described, “I think about what I might be able to pull from the ideas, and tweak them.”

LEARNINGS

## SPREAD

### HOW DO TEACHERS LEARN FROM EACH OTHER?

Inside and outside of the classroom, ideas are passed on from one person to the next. Given the importance of relationships, it is remarkable that most education reforms are oriented toward tools, content, and systems—not personal connections. There is great opportunity for digital tools to evolve and facilitate these connections: “Technology is awesome, but there’s nothing like talking with someone face-to-face,” says Jazmin, a high school teacher in El Paso ISD.

## INTEGRATE

### HOW DO TEACHER-GENERATED IDEAS INTEGRATE IN THE LARGER SYSTEM?

When ideas feel “pushed,” resistance can be stifling. But when teachers feel they’re on the same team with principals and district leaders, and are aligned around a common vision, innovation thrives. Kristine, principal at El Paso High School, has spent years building her team’s alignment so that, “Creativity and innovation [have] become who we are.”

THREE STRATEGIC OPPORTUNITY AREAS

## REFRAME INNOVATION AS ADAPTATION



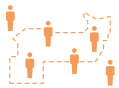
How might we recognize teachers as masters of adaptation?

## SCALE RELATIONSHIPS



How might we build the creative capabilities of school districts?

## ALIGN ACROSS LEVELS FOR INNOVATION



How might we elevate teachers and their integration approaches?

## **Appendix F: Program Evaluation Model for The Teachers Guild**

The following document describes how The Teachers Guild planned—as of November 8, 2016—to assess its future success. It begins by capturing a more detailed story of aspired impact that complements and enriches Appendix B. It continues by identifying the metrics and evidence that can be gathered to assess the Guild’s success.

<b>Aspirational Impact Story</b>	
We nurture a growing community of 90,000 teacher-innovators who represent our national teaching corps by school type, income, and race...	...With a particular focus on serving communities of modest means and communities of color.
The Guild community engages together more deeply and regularly than typical teacher leadership alternatives...	...And distinctively unites teachers, principals, and district colleagues—often disconnected—around the shared excitement of innovation.
More than 100 education, business, technology, and philanthropic partners have invested in growing and developing Guild teachers over the past three years...	...And with their support, Guild teachers are advancing the pace of education innovation, generating over 5,000 ideas and insights in the past three years.
Through their Guild experience, teachers report greater competence and confidence with their work...	...And encourage fellow educators to join the Guild experience.
Not only do principals and district colleagues identify Guild teachers as creative leaders in their schools...	...But fellow educators are also eager for Guild teacher innovations, as one-fifth of Guild teacher ideas have been adopted in other schools and classrooms.



[illegible]



## **Appendix G: Retrospective Impact Report for The Teachers Guild**

The following document—produced on February 28, 2017—reflected on The Teachers Guild’s first 18 months of start-up activity. It was used to facilitate fundraising discussions and to engage current and new championing stakeholders for The Teachers Guild.





*the* TEACHERS GUILD

# Impact Report

2015-2016

“There is this shared belief among educators today that the status quo is not okay. And that we are actually in the position to do something about it.”

— ANU OZA, 7TH GRADE ENGLISH TEACHER





# Dear Friends,

Our team is inspired by the everyday innovation of our teachers. In the past 18 months, we launched an online community of 6,500 teachers and traveled across the United States to learn from their experience. From the U.S./Mexico border in El Paso, to Silicon Valley, to New York City, to Atlanta and South Carolina, what we know is that when you peek into school walls, and see how teachers strive to inspire and engage their students, it's remarkable.

Teachers are transforming their classrooms with impactful approaches like personalized and project-based learning. They are building new skills in technology and data management. And in this divisive time, teachers are leading courageous discussions about race, immigration, religion, and privilege with their students, schools, and communities. However, while teachers have the greatest impact on our students, their innovations go unseen and their expertise goes unrecognized. Teachers too often are left out of the decision-making. Together, with all of you, we want to change that. The time for teachers is now, and we hope our community will honor teachers as creative leaders, create better solutions for our students and schools, and catalyze a system that welcomes and adopts teacher-designed solutions.

Thank you for making the Guild a reality and I hope you enjoy our first impact report!

**Molly McMahon**  
**Director**  
**The Teachers Guild**







A group of teachers are gathered in a modern office or meeting room. In the foreground, a man in a blue patterned shirt is smiling and gesturing with his hands. Behind him, a woman with long blonde hair is also smiling. To the right, a woman with dark hair is gesturing with her hands, and another woman in the background is cheering with her arms raised. The room has large windows and modern furniture.

**Teachers  
asked what  
was next...**



# In summer 2015, we founded The Teachers Guild.

The Teachers Guild is a member-led community where teachers can create systemic change for and from their classroom. Our hope is that by consistently innovating for students' evolving needs, teachers will transform their profession into a creative force.

---

## OUR DESIRED IMPACT



Teachers honored as creative leaders



Better solutions for our students and schools



A system that welcomes and adopts  
teacher-designed solutions

**We are inspired  
by teachers’  
passion to  
imagine and  
design a better  
future with and  
for their students.**

We designed an experience—both online and in person—that allows educators to **collaborate and create solutions** for their students’ unique needs.

---

## OUR OFFERINGS



### TOOLKIT

Learn creative problem-solving methods and mindsets



### ONLINE PLATFORM

Collaborate and create better solutions



### COACHING AND MENTORSHIP

Develop creative capacity



### LOCAL IN-PERSON EVENTS

Expand creative leadership



### PARTNER NETWORK

Bring teacher-designed solutions to life



A woman with dark hair and glasses, wearing a yellow shirt, is looking upwards and to the right. In the background, two other people are visible, one of whom is pointing towards the right. The scene appears to be a workshop or meeting.

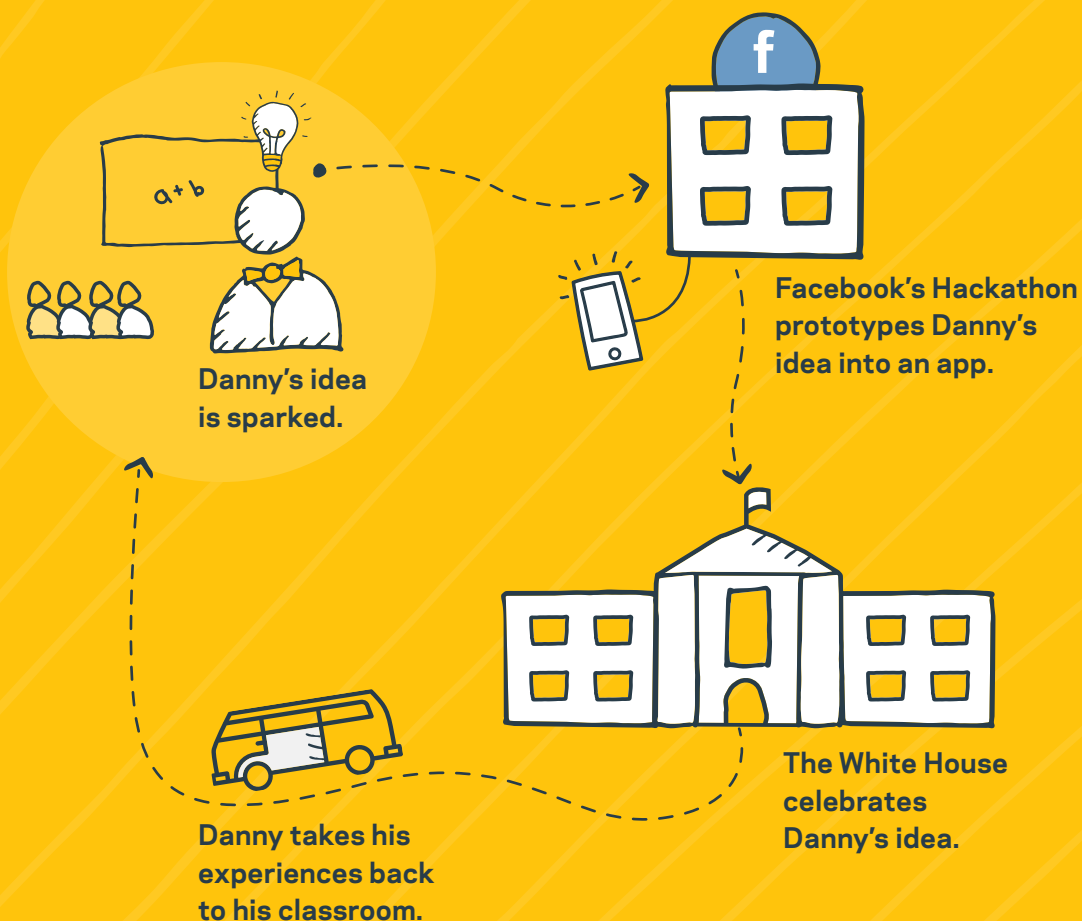
**We are  
beginning  
to see the  
impact of  
teachers as  
a creative  
force.**





# Meet Danny Scuderi

DANNY'S CREATIVITY IS RECOGNIZED AND STRENGTHENED



How might we celebrate teachers more broadly as creative leaders?

"I really wanted to contribute to something beyond my job, something on a broader scale," reflects Danny Scuderi, a middle school English teacher at Marin Horizon School in California. After seven years in the classroom, Danny was eager for new opportunities to grow further as a teacher-leader.

**I realized I could create something outside my job with reach beyond my school... like all the way to the White House!**

As part of the Guild's design collaboration for college readiness, Danny developed an idea called "Survival Week" that supports soon-to-graduate high school seniors in successfully

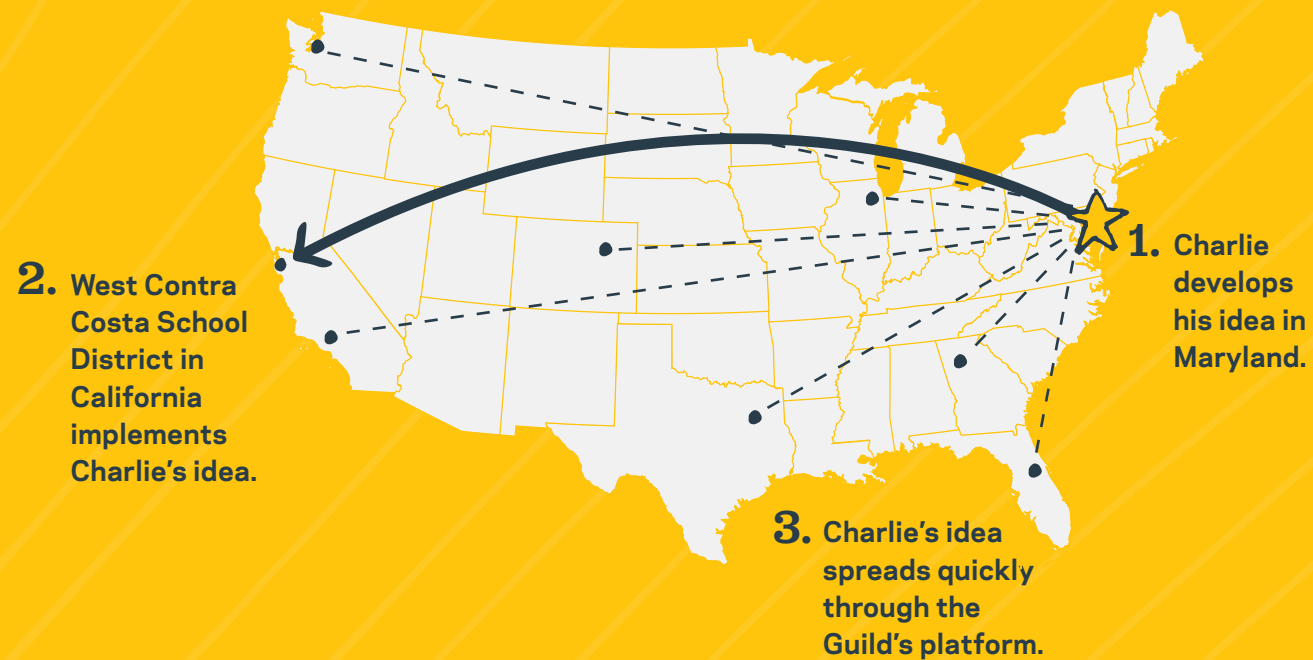
transitioning to college. As a Guild partner, Facebook developed "Survival Week" into a gaming app during a hackathon they hosted with students, teachers, and engineers.

Additionally, Danny's idea was selected as a "favorite" by First Lady Michelle Obama's Reach Higher initiative, and in July 2016, he joined five Guild educators at a White House summit for first-generation college students. Danny shares about the experience: "To be a part of an event with kids who were beating the odds—to be a part of their story—was unbelievable."



# Meet Charlie Shryock

CHARLIE LEADS BY CREATIVE EXAMPLE



How might we offer teachers new leadership pathways in creativity? Charlie Shryock, an English teacher in Maryland with 15 years of experience, reflects on his teaching practice: "I'm the kind of person who can't help noticing ways things can be improved."

As part of the Guild's design collaboration to foster a culture of innovation in schools, Charlie developed an idea that flips the energy of teacher absences from dispiriting to inspirational—

**“I’m part of the Guild because I want teachers to have a voice in creating change.”**

where students pursue their own passion projects during substitute coverage.

Charlie's students and the Guild community helped him prototype his idea in his classroom, and the momentum grew from there.

Across the country in California, West Contra Costa School District adapted and implemented Charlie's idea. As a Guild partner, Google for Education helped to spread Charlie's idea further. Other teachers and schools across the country adapted Charlie's idea through the Guild platform.

Invigorated by his experience, Charlie now leads workshops as a Guild coach and inspires fellow teachers to imagine better solutions together. Looking forward, Charlie sees himself “now helping others gain the same confidence needed to design solutions for their communities.”



# Meet Jennifer Gaspar-Santos

JENNIFER'S IDEA REACHES 5 MILLION PEOPLE



How might we accelerate education innovation by making teachers' ideas more accessible and adaptable by fellow educators?

Jennifer Gaspar-Santos was seeking a collaborative community that could take her classroom ideas to the next level.

"I wanted to reimagine report cards in a way that illuminated the learning journey, rather than just focusing on grades and outcomes." Jennifer shared her idea with fellow Guild teachers and coaches who jumped in to help her deepen and refine her idea of redesigning report cards as engaging infographics.

**“In a profession where you often plan on your own, support like [the Guild community] is truly wonderful.**

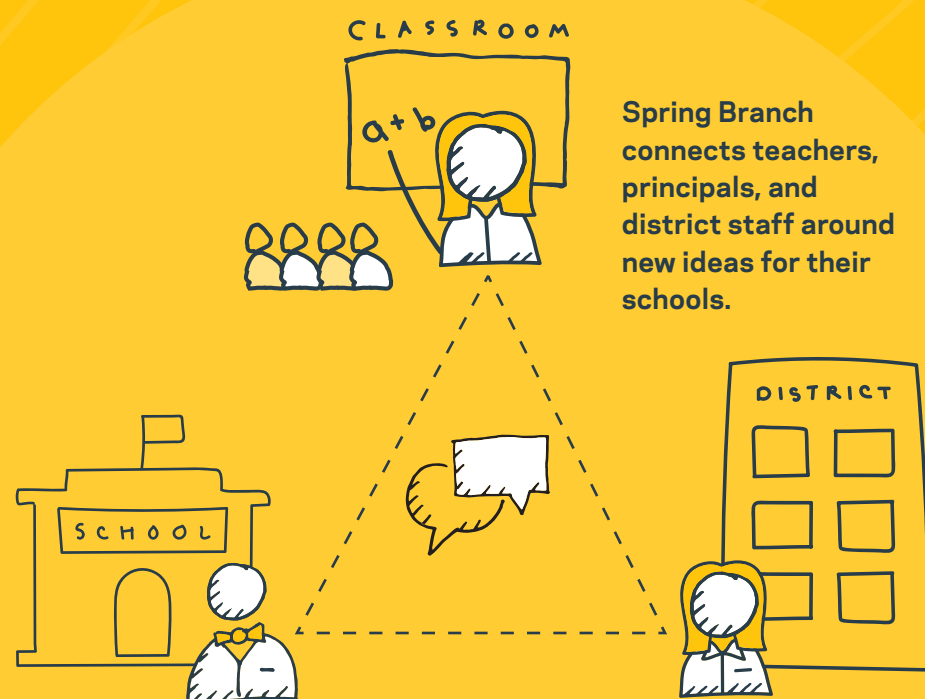
The Teachers Guild connected Jennifer with mentors from two of our partner organizations: the Royal Society of Arts in the U.K., and Piktochart, the online platform she used to design her idea. Together, they helped Jennifer pilot, evaluate, and launch her idea.

These relationships inspired Piktochart to build a template based on Jennifer's infographic so that any educator across the globe can use her idea for free. Through the Guild, Jennifer's idea and influence have scaled well beyond the four walls of her classroom to more than five million Piktochart users worldwide.



# Meet Spring Branch

—  
SPRING BRANCH FOSTERS CREATIVE  
PROBLEM-SOLVING ACROSS A DISTRICT



How might education innovation improve if districts joined forces with teachers to amplify teachers' creativity? The Guild recently partnered with Spring Branch Independent School District, which sought to boost their teachers' confidence as creative leaders after becoming a new Texas District of Innovation.

**“It wasn’t just me sitting in a meeting; it was me changing the way I’m teaching for the better of my students.”**

— MARIA REZA, SECOND GRADE TEACHER

Maria Reza, a second grade Spring Branch teacher, reflected on her collaboration with the Guild community around novel STEM solutions: “It was a very different, action-based kind of professional development. It freed my brain in so many ways, and I was able to get creative. We are so excited about it!”

As Spring Branch’s Strategic Initiatives Special Projects Liaison, Skyler Rossacci shared: “We were moving as a district towards personalized learning and innovation and needed to find a new way of engaging every teacher in the process. The Guild created a culture of empowerment and encouraged risk-taking. Teachers who didn’t think they could make change now know that they can.”

Building on their Guild experience, Spring Branch now hosts its own design challenges and launched an “Innovation Portfolio” that gathers teacher ideas and shares them across the district for fellow teachers to implement.





**Our community connects teachers to design better solutions for the most pressing topics in education.**

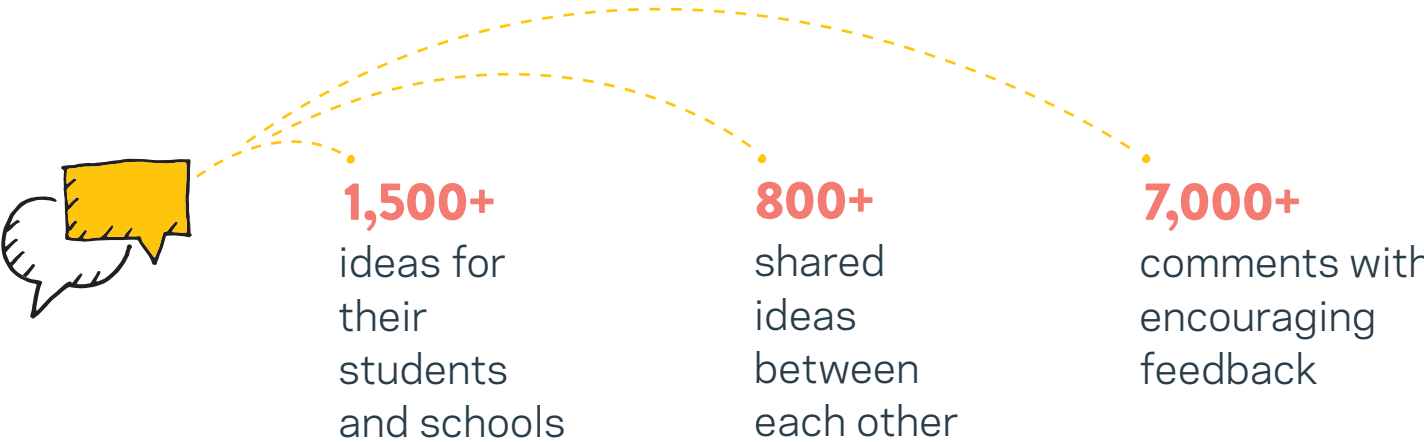


As we launched, we focused on connecting a nationwide community of creative and collaborative teachers.

Through our platform, teachers participated in 9 design collaborations in 18 months.

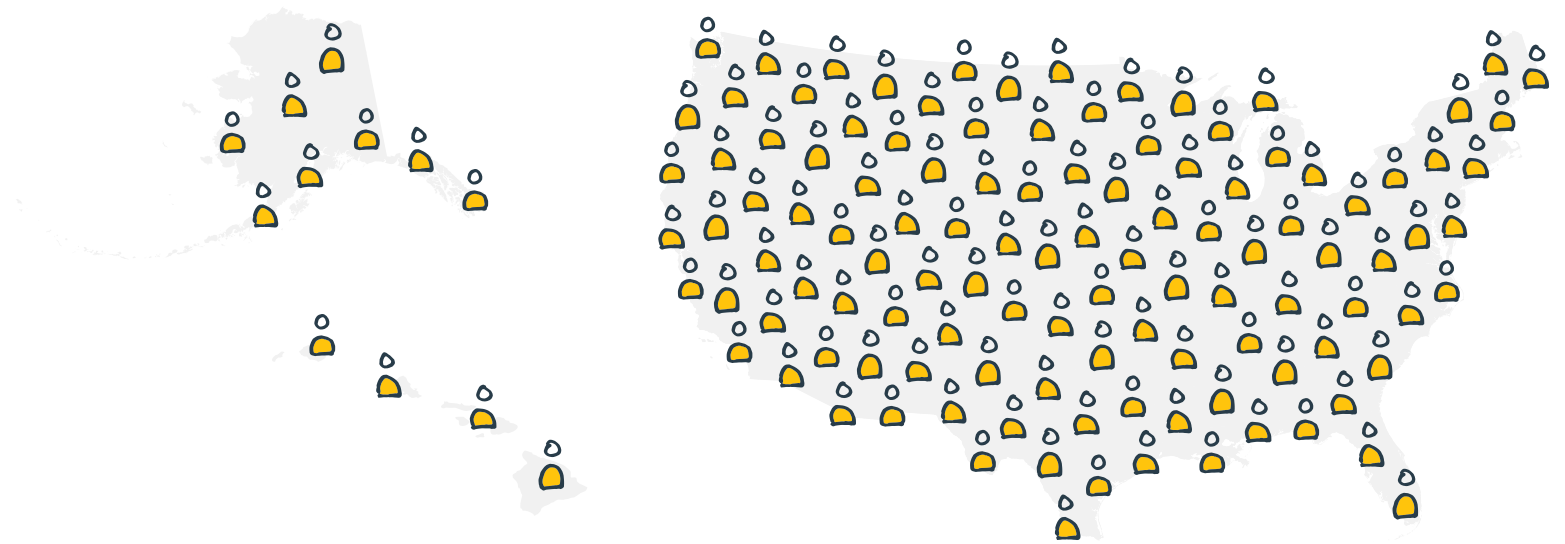
- |                               |                            |                    |
|-------------------------------|----------------------------|--------------------|
| A CULTURE OF INNOVATION       | TO AND THROUGH COLLEGE     | CHARACTER BUILDING |
| STUDENT CURIOSITY             | STUDENTS AS MAKERS         | STEM               |
| TEACHER PROFESSIONAL LEARNING | PARENT-TEACHER CONFERENCES | CIVIC ENGAGEMENT   |

Guild teachers help each other refine, share, and adapt each others' solutions.



**Our early engagement numbers suggest we are on to something powerful.**

Our community includes **6,500+** teacher members from all **50** states.



Our teachers—**some of the busiest people out there**—engage actively with the Guild.



Time per visit on Guild's website—**13** minutes—is twice as high as Pinterest's



**1,000,000+** social media impressions for our two most popular design collaborations: College Access and STEM

**Through their  
Guild experience,  
teachers expanded  
their own creative  
leadership.**



**93%**

agreed that they “can effect change in education beyond my classroom”



**69%**

reported that “connecting with like-minded educators” was valuable



**59%**

learned to “gather insight to inspire new ideas”

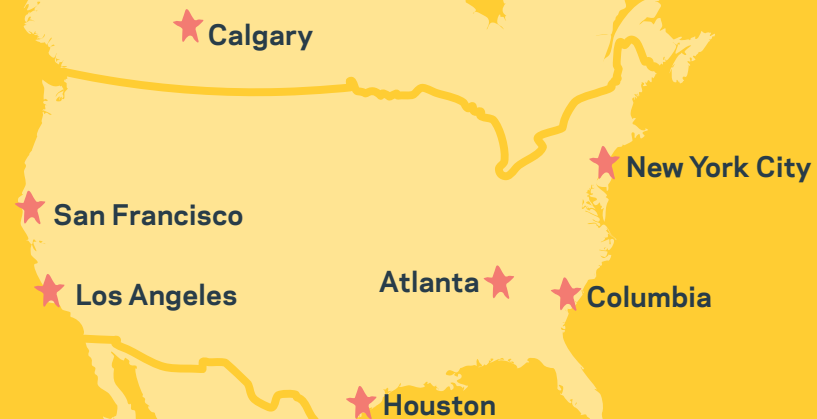


**“As a global community of active and dynamic educators, we collaborate, test out ideas, and ‘create best practices.’ This is what 21st-century education is supposed to look like.”**

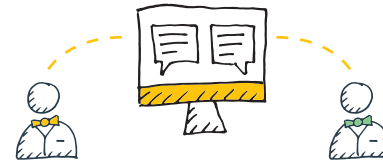
— ALAIN CLAPHAM, LONDON, ENGLAND



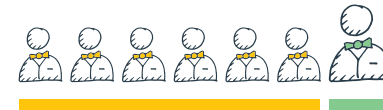
**Teachers  
expanded their  
creative capacity  
with the help of  
teacher coaches  
from across  
North America.**



Our coaches—over 25 teacher-designers—**encourage Guild teachers** to try new creative methods and mindsets. Each coach is committed to greeting every new community member.



**800** ideas advised



**6:1** teacher-to-coach ratio when building ideas



**“I do not think I have ever felt so encouraged and supported by a professional learning community in my 15 years of teaching.”**

— LAUREN SAYER, MELBOURNE, AUSTRALIA

**Teachers were exposed to new expertise and pathways to take their innovations beyond the classroom.**

**More than 100 mentors** with design, business, and operations expertise joined, advised, and supported Guild teachers.

## DISTRICT INNOVATORS

Nueva

Spring Branch  
Independent School District

Sonoma County  
Office of Education

RICHLAND  
SCHOOL DISTRICT  
TWO



El Paso  
Independent  
School District.

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SCIENCES

Bay Area  
Discovery  
Museum

Steelcase

AUTODESK.

ONENOTE  
PLACE



A woman with dark hair is shown in profile, looking towards the right. She is wearing a light-colored collared shirt. In the foreground, the nose and eye of another person are visible but out of focus. In the background, another person is also out of focus. The lighting is soft and warm.

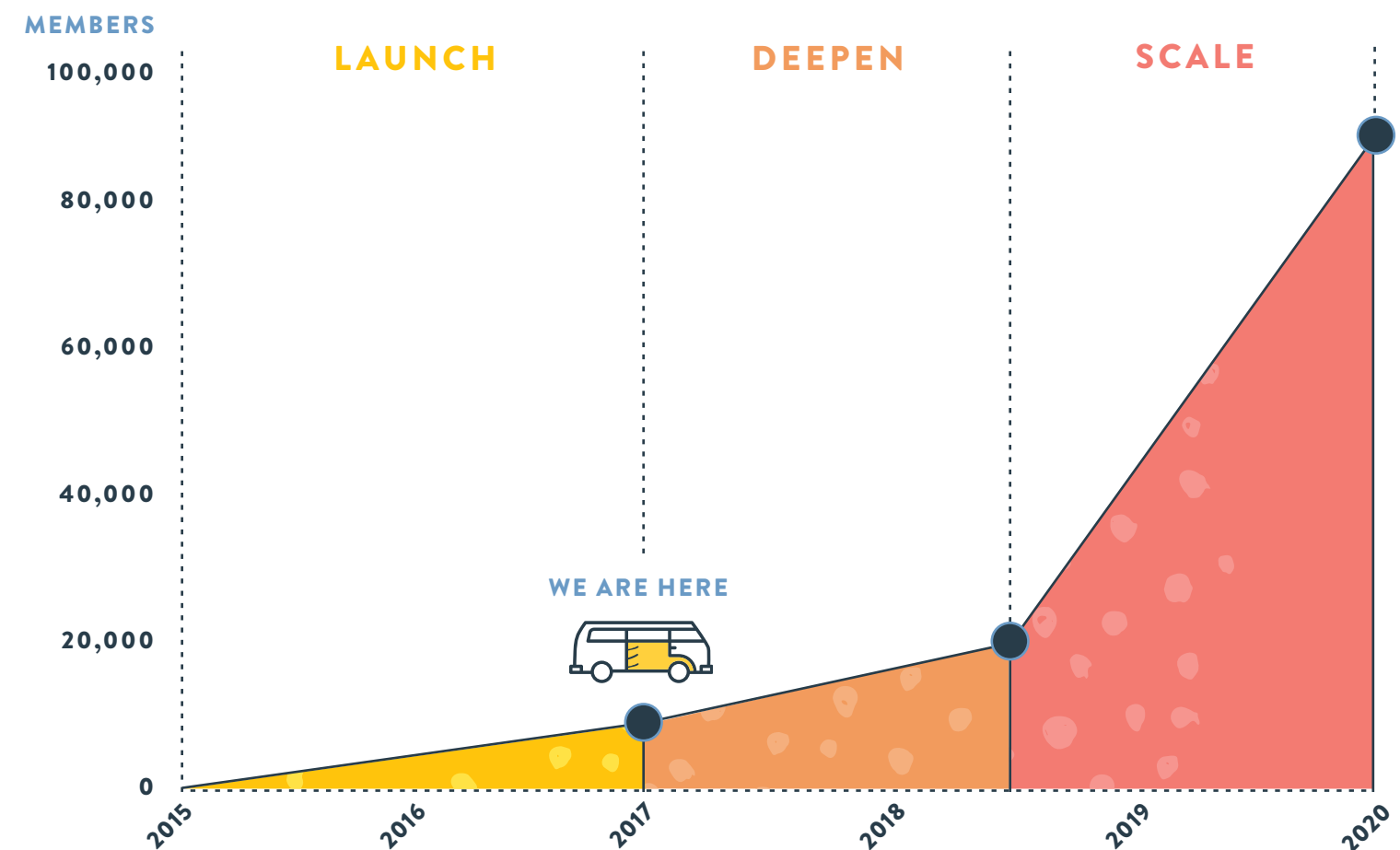
**In 2017, we are building on  
our momentum to deepen  
and scale our impact.**



By 2020, we  
plan to engage  
**90,000**  
**teacher-**  
**innovators**  
who will  
catalyze the  
creativity of  
our national  
teaching corps.

## LOOKING FORWARD TO THE NEXT FEW YEARS...

1. First, we will **deepen** teacher relationships and diversify our community through local chapters and district partnerships.
2. Then, we will **scale** our reach by driving the spread and adoption of teacher-created solutions.



# We will deepen and scale our impact by exploring three key questions:

## How might we transition from connections to trusting relationships?

### WE WILL...

Offer in-person experiences that bring colleagues together and deepen collaboration, such as local Guild chapters and an expanded teacher coaching program.

### OUR DESIRED OUTCOMES...

- Integration across roles as teachers, principals, and district staff innovate together
- Schools and districts shift towards a collaborative and creative culture

## How might we engage a more diverse community of educators?

### WE WILL...

Personalize the Guild's newest professional learning offers—including certifications, in-person training, and assessments—explicitly for diversity and district partnerships.

### OUR DESIRED OUTCOMES...

- Guild teachers increasingly serve racially and socioeconomically diverse school communities
- Larger, more active creative collaborative that reflects our national teaching corps

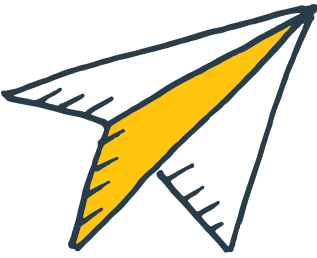
## How might we establish new, creative teacher leadership pathways?

### WE WILL...

Validate teacher-created solutions by gathering evidence on their impact and encouraging teachers to adapt peers' innovations for their own students and schools.

### OUR DESIRED OUTCOMES...

- Teacher-created ideas are adopted in other classrooms, schools, and districts
- Teachers thrive as creatively confident leaders



# Join our community...

[TEACHERSGUILD.ORG](http://TEACHERSGUILD.ORG)

# Let's talk more...

[HELLO@TEACHERSGUILD.ORG](mailto:HELLO@TEACHERSGUILD.ORG)

# Stay in touch...

[@TEACHERSGUILD](https://www.instagram.com/TEACHERSGUILD)

[FB.ME/DARE2DESIGN](https://www.facebook.com/DARE2DESIGN)

## **Appendix H: Retrospective Business Development Data for the Design for Learning Studio**

The following artifacts—produced in April 2017—characterize D4L’s project portfolio from the beginning of 2013 through the end of 2016.

## Analysis of 2013-2016 Design for Learning Project Portfolio

April 19, 2017

### Who funded / hired D4L?

Buyer Type	Distribution by Project	Distribution by Revenue
Foundation	34%	35%
Nonprofit	24%	21%
Public	21%	19%
Private	10%	8%
For Profit	9%	15%
Internal	0%	0%
Individual	2%	1%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

#### Resulting Headlines

Almost 60% of our projects are with foundations or nonprofits (roughly 35% with foundations).

Roughly 20%-25% of our projects are with private schools or for-profits (roughly 10% with private schools and 10%-15% with for-profits).

Roughly 20% of our projects are with public schools, districts, or agencies.

These percentage distributions are generally consistent when analyzed by revenue (\$) or by project.

### Of foundation-funded D4L projects, whom did those projects serve?

Whom Served?	Distribution by Project	Distribution by Revenue
Mixed	50%	49%
U.S. Public Schools	20%	22%
Global Public Schools	15%	13%
Foundation	10%	5%
Other	5%	10%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

#### Resulting Headlines

Roughly half of our foundation-funded projects serve a mixed audience of public, private, nonprofit, and for-profit players across the sector.

Roughly 20% of our foundation-funded projects specifically intend to serve U.S. public schools and agencies.

Roughly 15% of our foundation-projects focus on global public schools.

Roughly 10% of our foundation-funded projects are focused internally for those foundations.

### What was the socioeconomic focus of D4L projects? Were D4L projects designed specifically for low-income, high-income, or mixed audiences?

Socioeconomic Focus?	Distribution by Project	Distribution by Revenue
High	12%	16%
Low	46%	51%
Mixed	40%	32%
N/A	2%	1%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

#### Resulting Headlines

Roughly half of our projects are designed specifically to serve low-income communities.